

BPM v7.5 – Build from Scratch

Lab Exercise



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Lab 2 Building a business process in Process Designer

This lab will introduce you to the IBM Process Designer. You will create a simple process flow for creating and fulfilling an order. You will leverage the Process Center to run the process at various points during the lab.

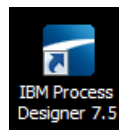
The first experience with any activity in the lab will be completely documented with screen shots. If the same type activity is repeated, subsequent steps will contain less detail. If you get stuck, either refer back to the early example, or ask for help. The IBMers in the room are here to help; do not hesitate to ask!

1.1 Start Up

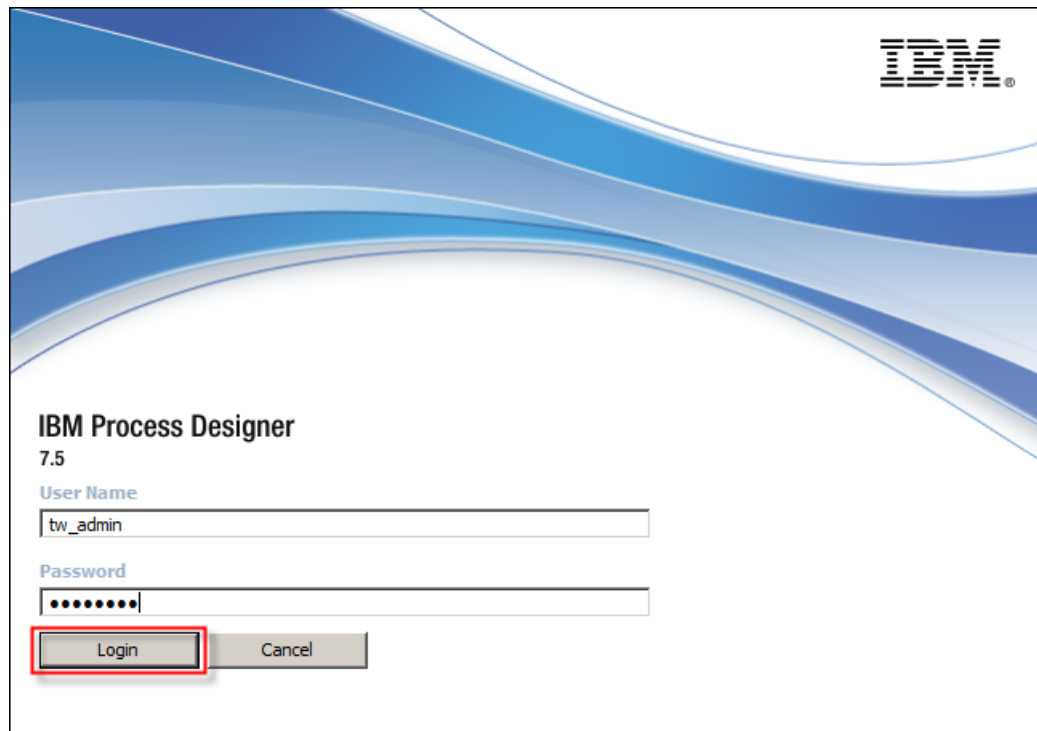
In this section, you will start the IBM Process Designer.

1.1.1 Start the Process Designer

1. If the Process Designer is not running, double-click on the *IBM Process Designer* icon on the desktop. It might take a couple of minutes for the login window to appear:



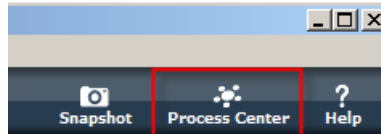
2. Enter *tw_admin* as the user name and as the password, then click *Login*:



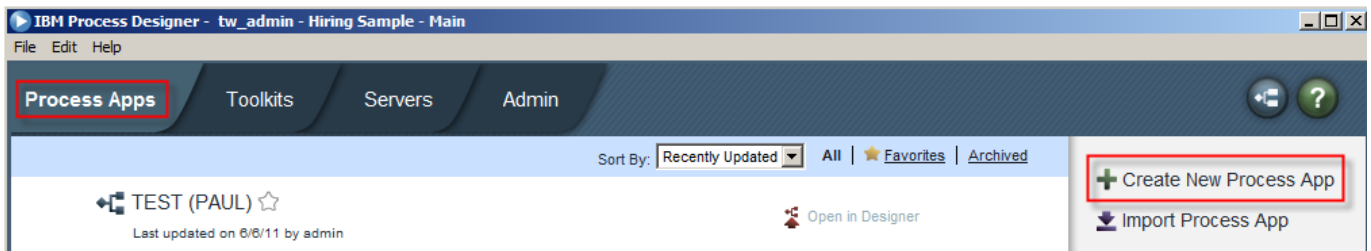
1.2 Part 1 – Create the Process

1.2.1 Create a New Process Application

- ___3. If you are not on the *Process Application* screen, click on the *Process Center* icon in the upper right-hand corner of the window.



- ___4. Click on the *Process Apps* tab in the upper left-hand corner of the window, and then click on *Create a New Process App*.



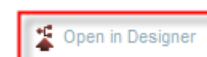
- ___5. In the *Create New Process App* window, enter the following information:

Process App Name:	Order Fulfillment BFS
Acronym:	OFBFS
Description:	Order fulfillment build from scratch lab

and then click *Create*.

 A screenshot of the 'Create New Process App' dialog box. It has a title bar with a close button (X). The form contains three fields: 'Process App Name' with the value 'Order Fulfillment BFS', 'Acronym' with the value 'OFBFS', and 'Description' with the value 'Order fulfillment build from scratch lab'. At the bottom right, there is a 'Create' button, which is highlighted with a red rectangular box.

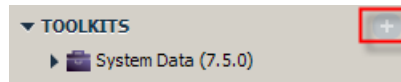
- ___6. The new process application has been created. Click on *Open in Designer*.



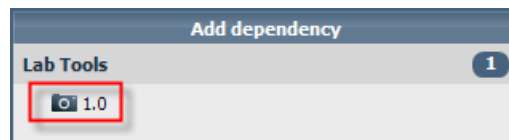
1.2.2 Add the Toolkit

Before you begin defining your process, it will be necessary to include a dependency on a toolkit. A toolkit is a collection of components that can be shared by multiple process applications. A toolkit can include any component that can be defined in a process application. In this scenario, you have been given a toolkit that contains the data type definitions for the lab.

1. Click on the *plus sign* (+) next to the **TOOLKITS** heading on the left-hand side of the window. (Note: The plus sign will appear as the mouse pointer enters the pane with the TOOLKIT list.)



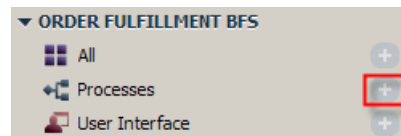
2. In the Add dependencies window, click on *Lab Tools, 1.0*.



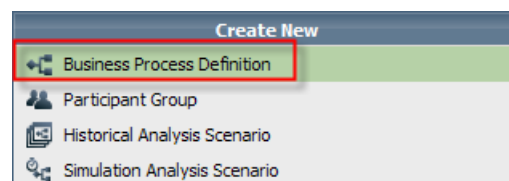
1.2.3 Define the Process Flow

The process flows are defined in a Business Process Diagram (BPD). The first step is to create a new BPD.

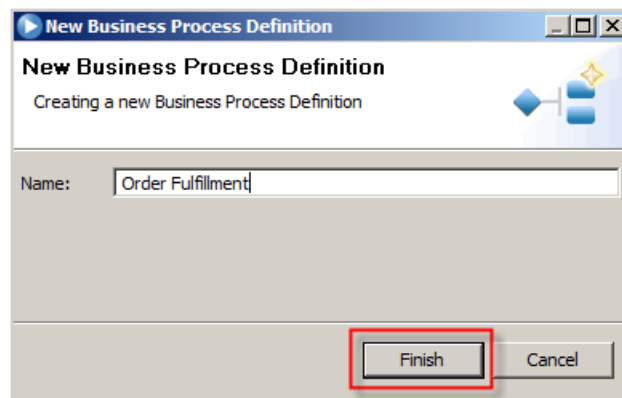
1. Click on the *plus sign* (+) next to the **Processes** heading on the left-hand side of the window. (Note: The plus sign will appear as the mouse pointer enters the pane.)



2. In the *Create New* window, click on *Business Process Definition*.

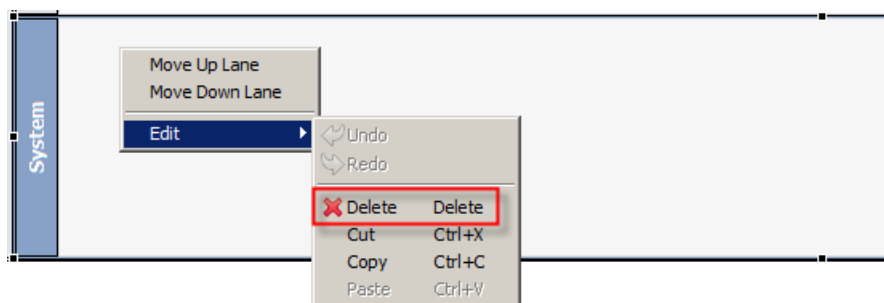


__3. Name the BPD *Order Fulfillment* and click *Finish*.



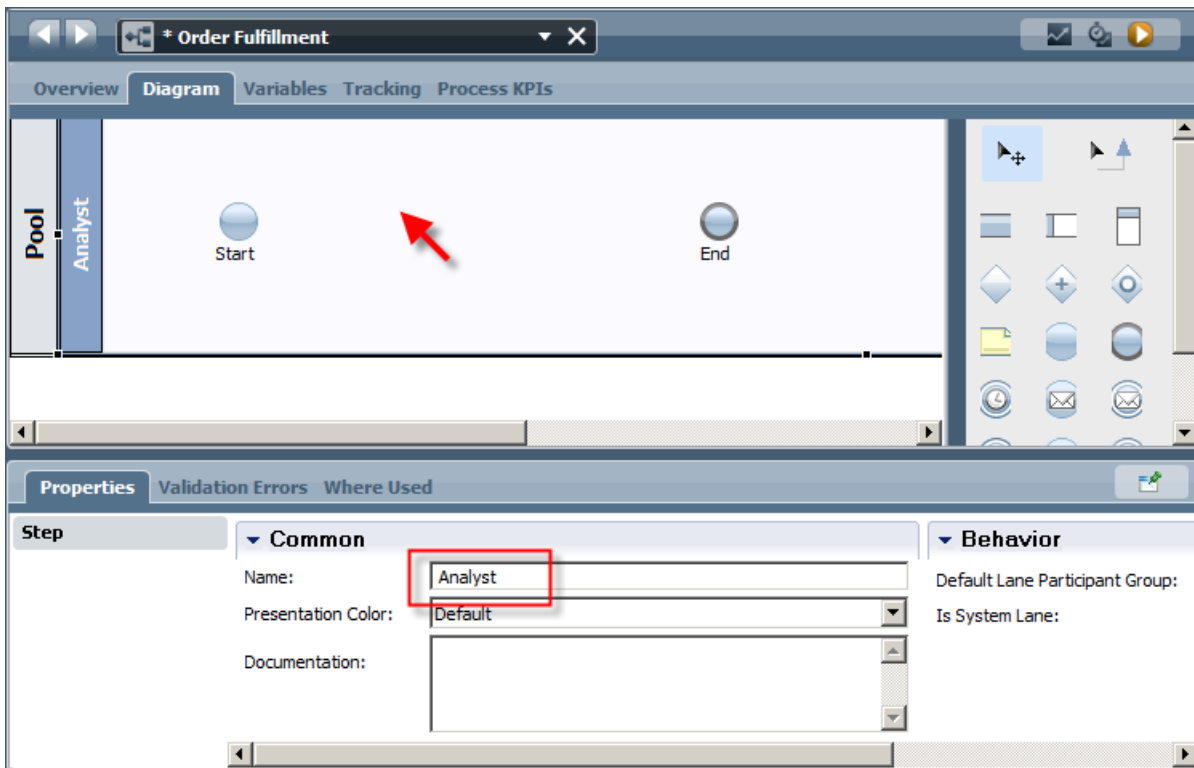
You are presented with a blank process with a *Start* and *End* event, and the default lanes (*Participant* and *System*). In this example you will not need a system lane as all of the activities are human-based activities. You will need two lanes—*Analyst* and *Vendor*.

__4. Right-click on the *System* lane, and select *Edit* → *Delete*.

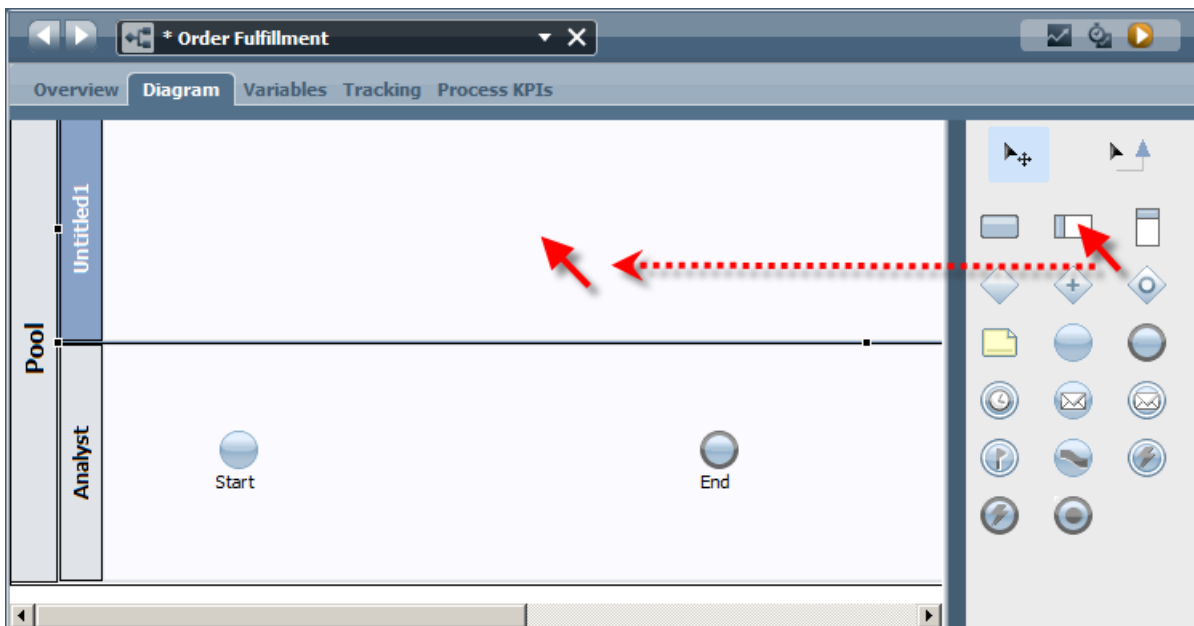


On the confirmation prompt, click Yes.

- __5. Click in the *Participant* lane (in the open space, not on the *Start* or *End* event.)
- __6. In the *Properties* pane at the bottom of the screen, change the name of the lane to *Analyst*.

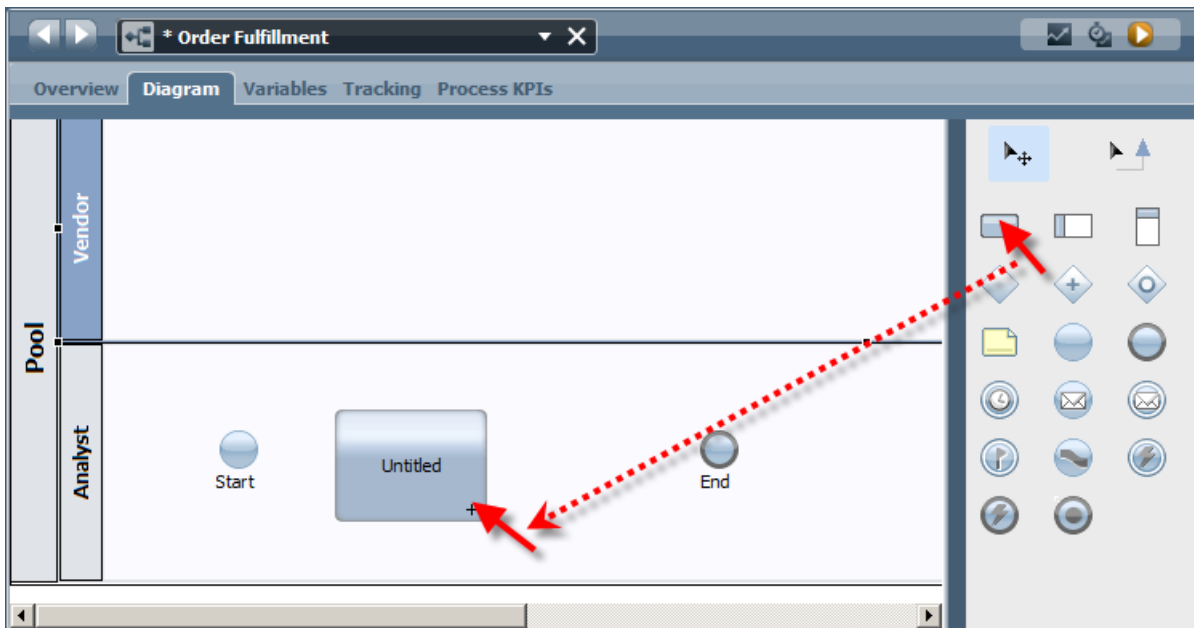


- __7. Drag a lane () from the palette and drop it on the diagram.

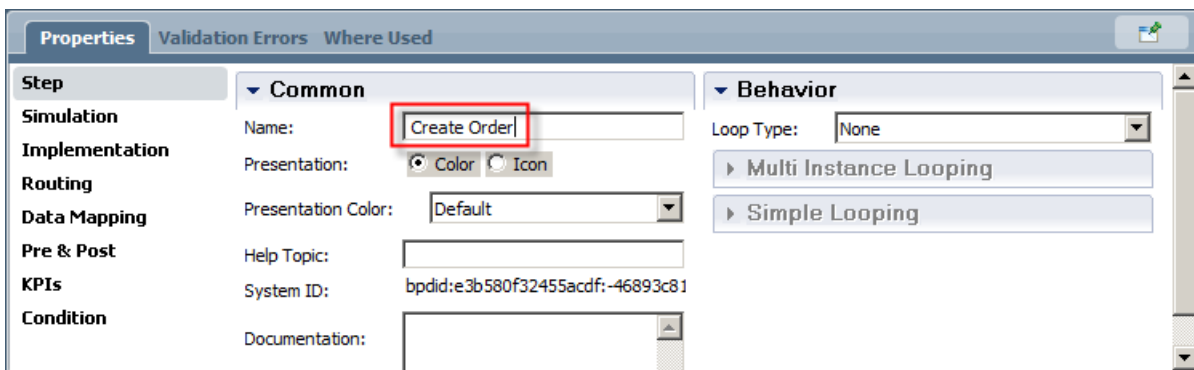


- __8. Change the name of the lane to *Vendor*.

- __9. Drag an activity () from the palette and drop it in the *Analyst* lane.

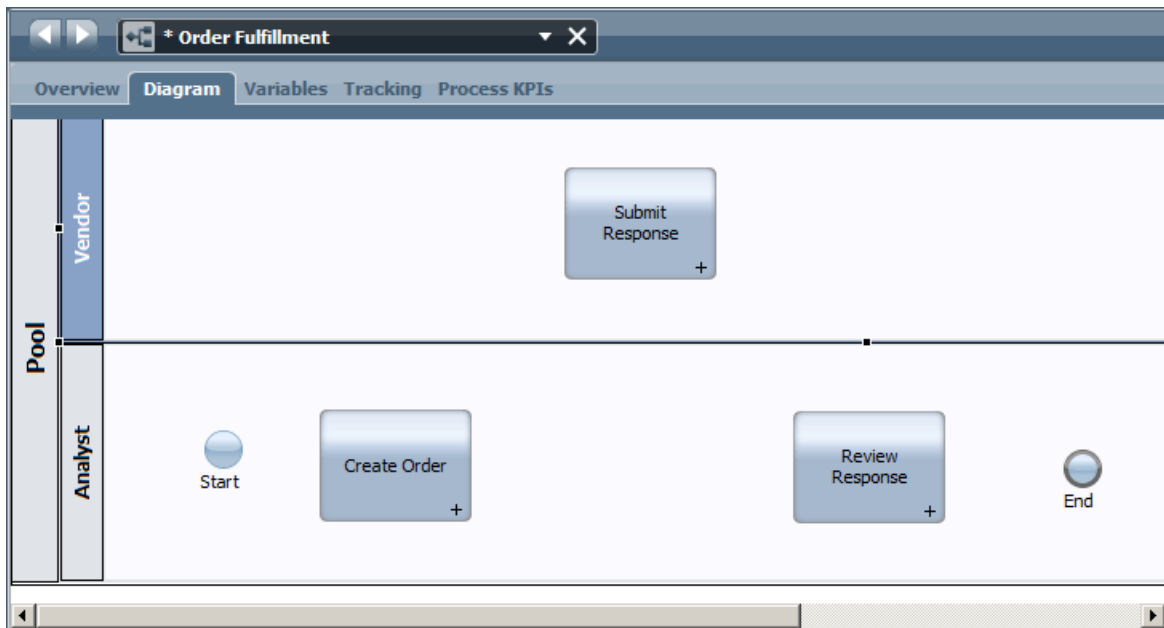


- __10. In the *Properties* pane, change the name of the activity to *Create Order*.



- __11. Drag and drop activity in the *Vendor* lane. Rename it to *Submit Response*.
- __12. Drag and drop an activity in the *Analyst* lane. Rename it to *Review Response*.

When you are finished, your diagram should look similar to the following picture:

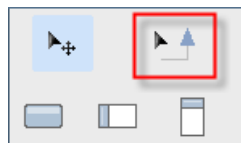


Now would be a good time to save your work.

- __13. Click on the Save icon (Save) on the top of the screen or press *Ctrl-S* to save your work.

The final step in creating our process is to connect all of the events and activities.

- __14. Click on the *Sequence Flow* icon in the palette.



When you use the *sequence flow* tool to connect the objects, you are presented with anchor points on the objects represented as blue dots when you hover over the objects. You can start and finish your connections using any one of the dots. To connect two objects, click on the desired anchor point of the source object, and then click on the anchor point of the target object.

- __15. Connect the *Start* event to the *Create Order* activity.

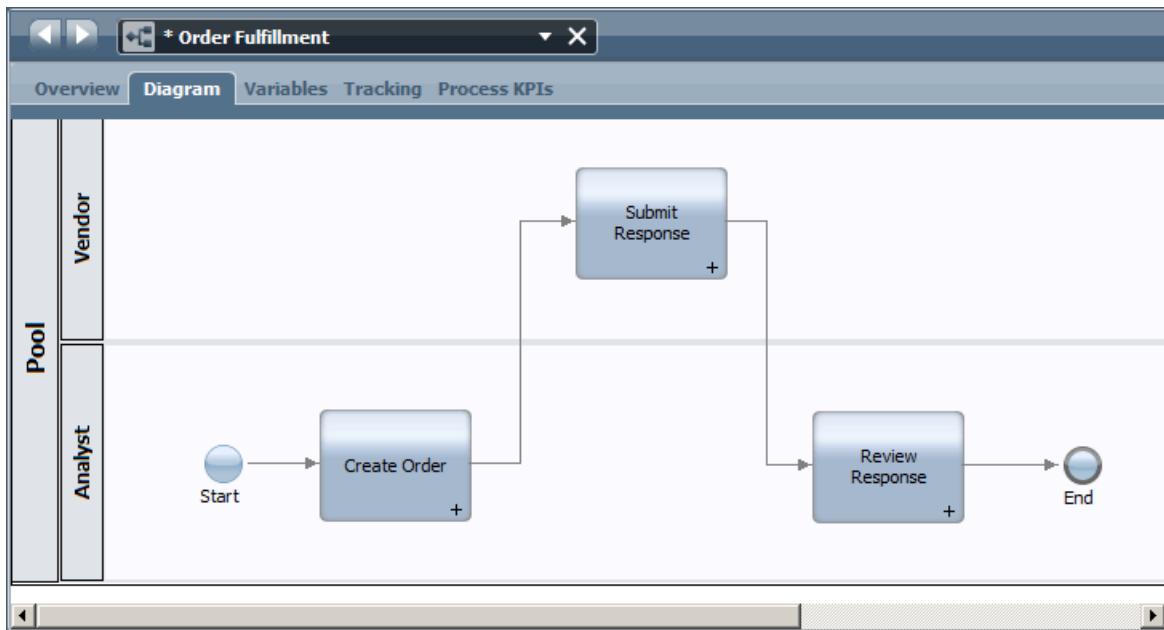


- __16. Connect the *Create Order* activity to the *Submit Response* activity.

- __17. Connect the *Submit Response* activity to the *Review Response* activity.

__18. Connect the *Review Response* activity to the *End* event.

When you are finished, your diagram should look similar to the following picture:

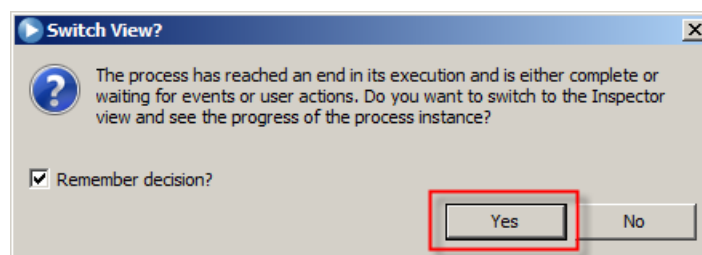


__19. Save your work.

1.2.4 Playback the Process

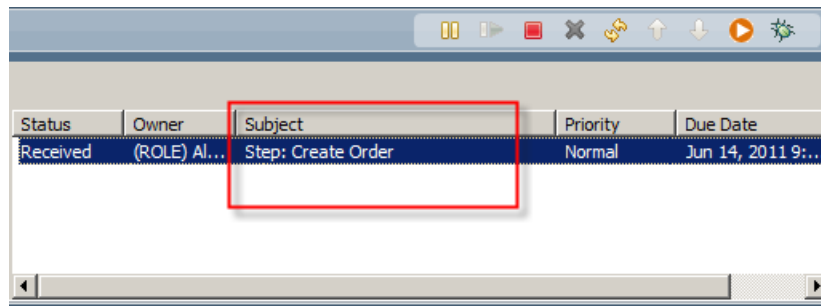
Even at this early stage it is possible to run the process. Even though none of the user interfaces have been defined, the system has default user interfaces that can be used to test the flow of the process.

- __1. Click on the *Run* (▶) button in the top right-hand corner of the screen.
- __2. At the *Switch View* prompt, click the *Remember decision?* checkbox, and then click the *Yes* button.

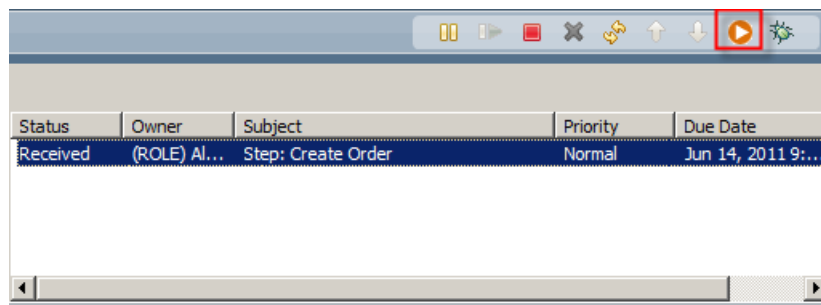


You are now in the Process Inspector. Here you are able to step through the process, activity by activity to ensure that the process is working as expected. The diagram in the bottom left pane shows the process diagram with a red token indicating which activity will be executed next. In the top right pane you select and run the activities.

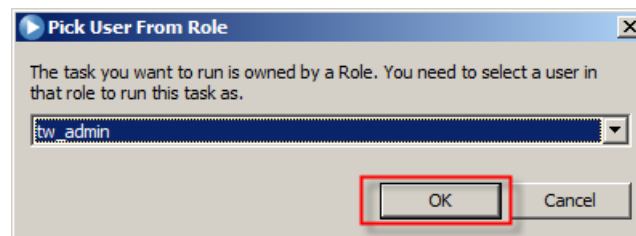
- __3. Select the *Create Order* step in the top right pane.



- __4. Click on the *Arrow* button above the activity to Run the selected task. (Not the *Run Process* button above the process diagram.)

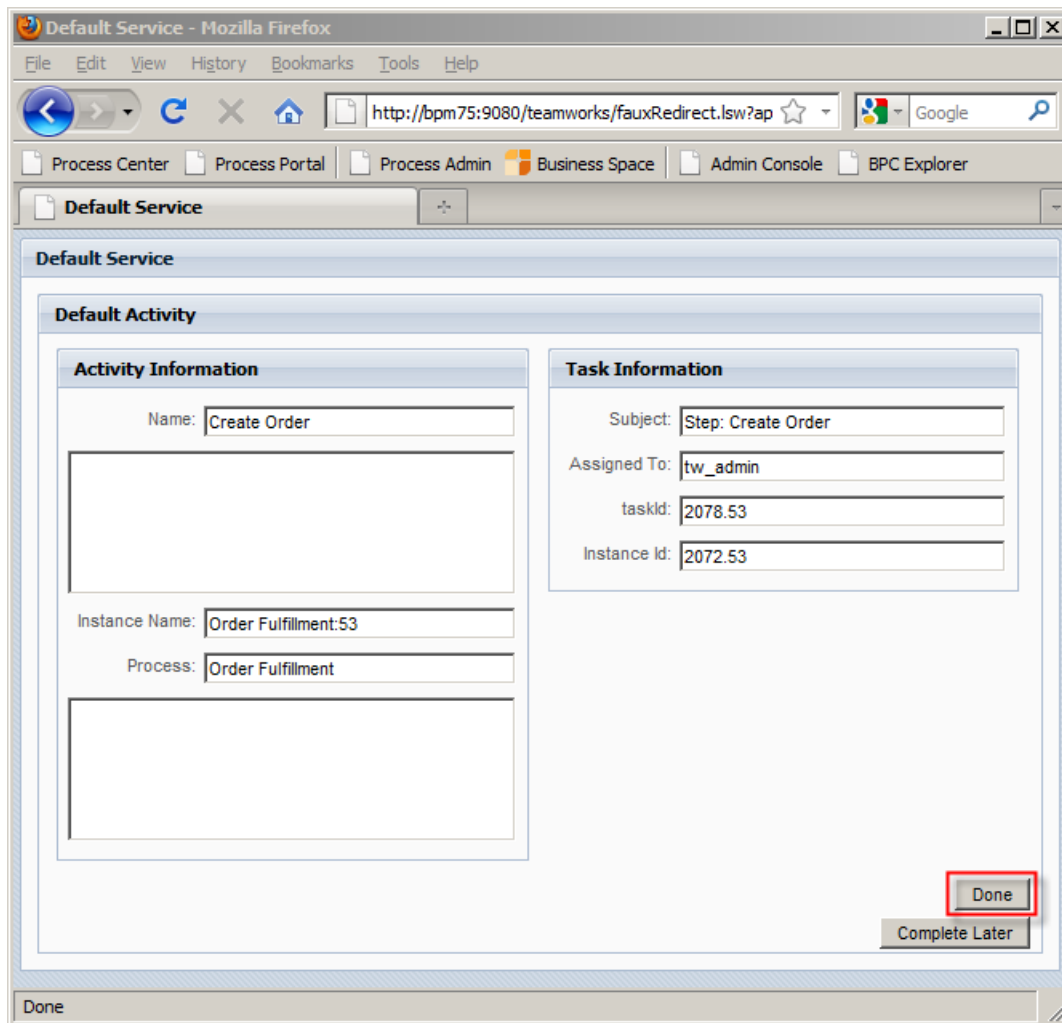


- __5. At the *Pick User from Role* prompt, select *tw_admin* and click *OK*.

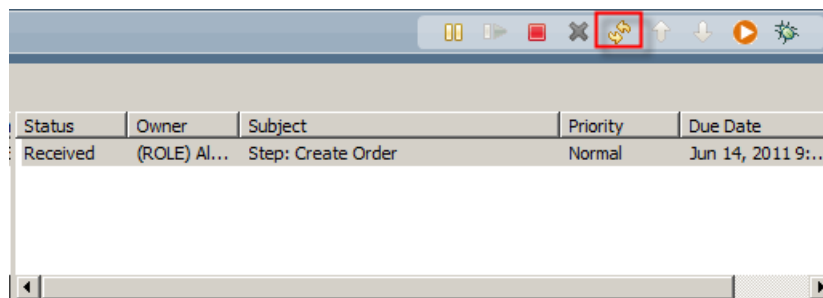


A Web browser window is displayed showing the default user interface.

__6. Click on the *Done* button. You will see the message *The service has finished*.



__7. In the Process Inspector, click on the *Refresh* (🔄) button.

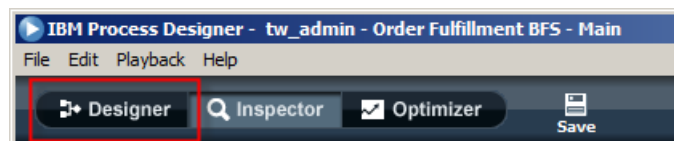


The step list is updated to show the *Create Order* activity is complete (closed), and the *Submit Response* activity ready to be executed.

- __8. Run the *Submit Response* activity.
 - __a. Select the step.
 - __b. Click the *Run* button.
 - __c. Run as *tw_admin*.
 - __d. Click the *Done* button.
 - __e. Close the browser window.
 - __f. Refresh the list.
- __9. Repeat the steps for the *Review Response* activity.

You have successfully completed one pass through the process.

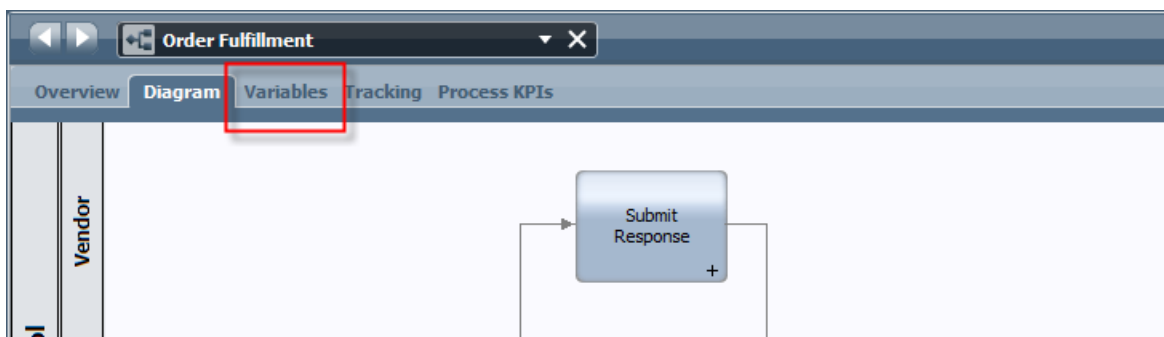
- __10. Click on the *Designer* tab to switch back to the Process Designer.



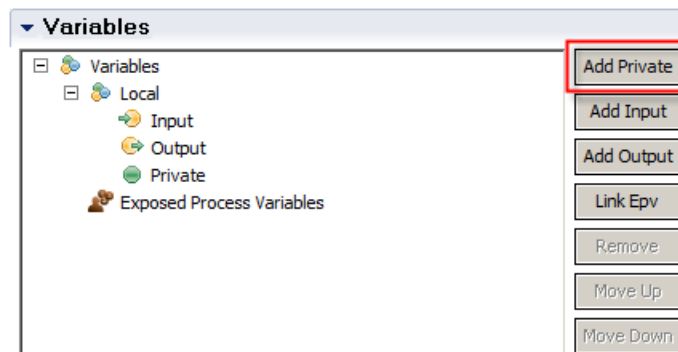
1.2.5 Define the Process Variable

Your process will need some place to save the order information from activity to activity. A process variable will be used to store this information. You will use the data type from the *Lab Tools* toolkit to define your *order* variable.

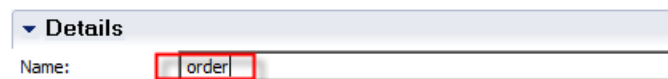
- __1. Click on the *Variables* tab at the top of the screen.



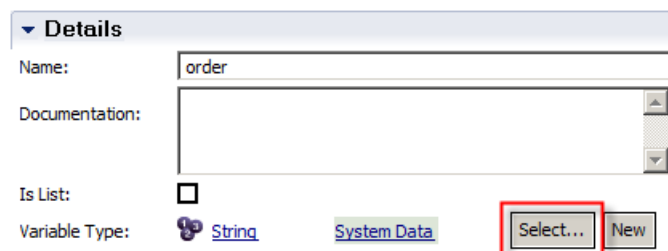
__2. Click on the *Add Private* button.



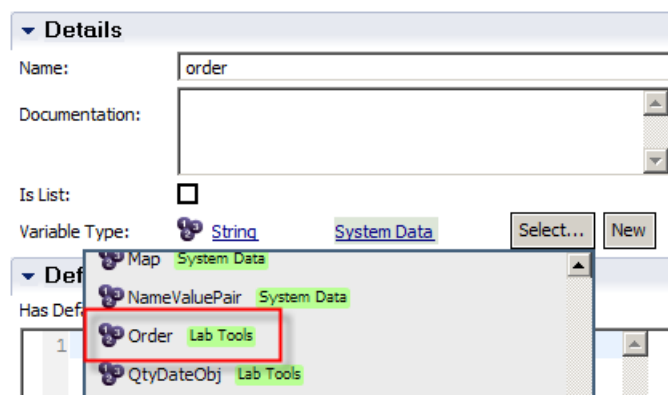
__3. In the *Details* area, name the variable *order*.



__4. Click on the *Select* button.



__5. Click on the *Order* type.



__6. Click the *Has Default* checkbox.

Details

Name:

Documentation:

Is List: ☐

Variable Type: [Order](#) [Lab Tools](#) [Select...](#) [New](#)

Default Value

Has Default: ☒

__7. The Variables screen should look similar to the following screenshot

Variables

- Variables
 - Local
 - Input
 - Output
 - Private
 - order (Order)
 - customer (String)
 - priority (String)
 - issueDate (Date)
 - materialDesc (String)
 - totalQty (Integer)
 - quoteDeadlineDate (Date)
 - plannerComments (String)
 - approved (Boolean)
 - vendorResponse (VendorResponse)
- Exposed Process Variables

Details

Name:

Documentation:

Is List: ☐

Variable Type: [Order](#) [Lab Tools](#) [Select...](#) [New](#)

Default Value

Has Default: ☒

```

1 var autoObject = new tw.object.Order();
2 autoObject.customer = "";
3 autoObject.priority = "";
4 autoObject.issueDate = new TWDate();
5 autoObject.materialDesc = "";
6 autoObject.totalQty = 0;
7 autoObject.quoteDeadlineDate = new TWDate();
8 autoObject.plannerComments = "";

```

Business Data Search

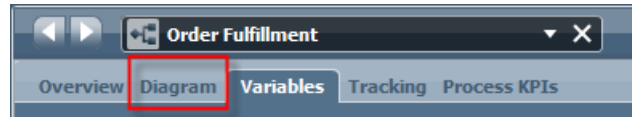
Performance Tracking

__8. Save your work.

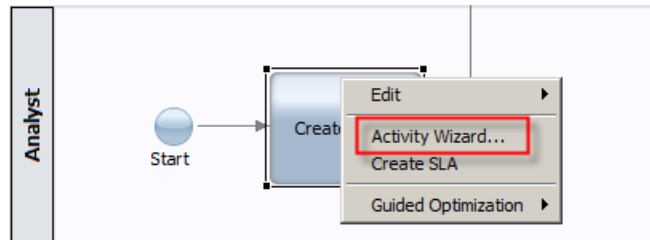
1.2.6 Create the Default User Interfaces

With the diagram and the variables defined, you are ready to create the user interfaces. In this lab you will use the *Activity Wizard* to create the base screens which you can then customize.

__1. Click on the *Diagram* tab.



- __2. Right-click on the *Create Order* activity, and select *Activity Wizard*.



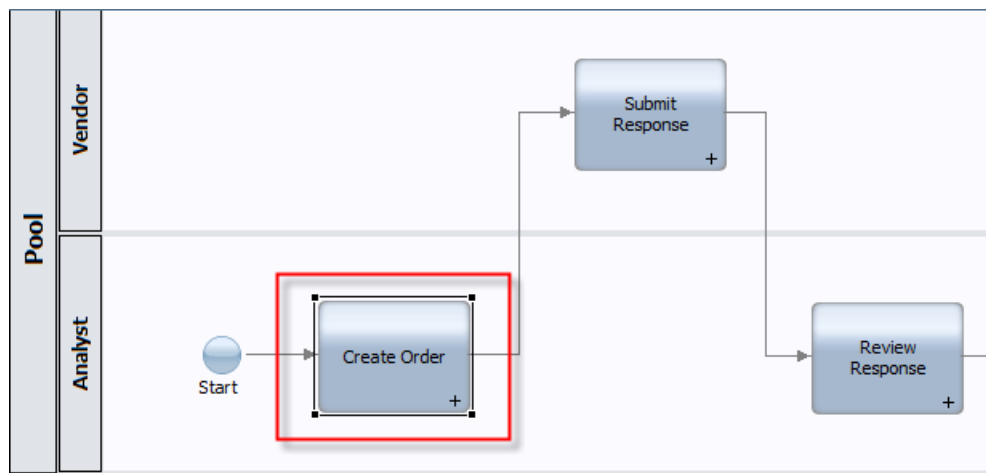
- __3. In the Activity Wizard, accept all of the defaults, and click *Finish*.

- __4. Repeat the steps to use the Activity Wizard to create the user interface for the *Submit Response* activity.
- __5. Repeat the steps to use the Activity Wizard to create the user interface for the *Submit Response* activity.
- __6. Save your work.

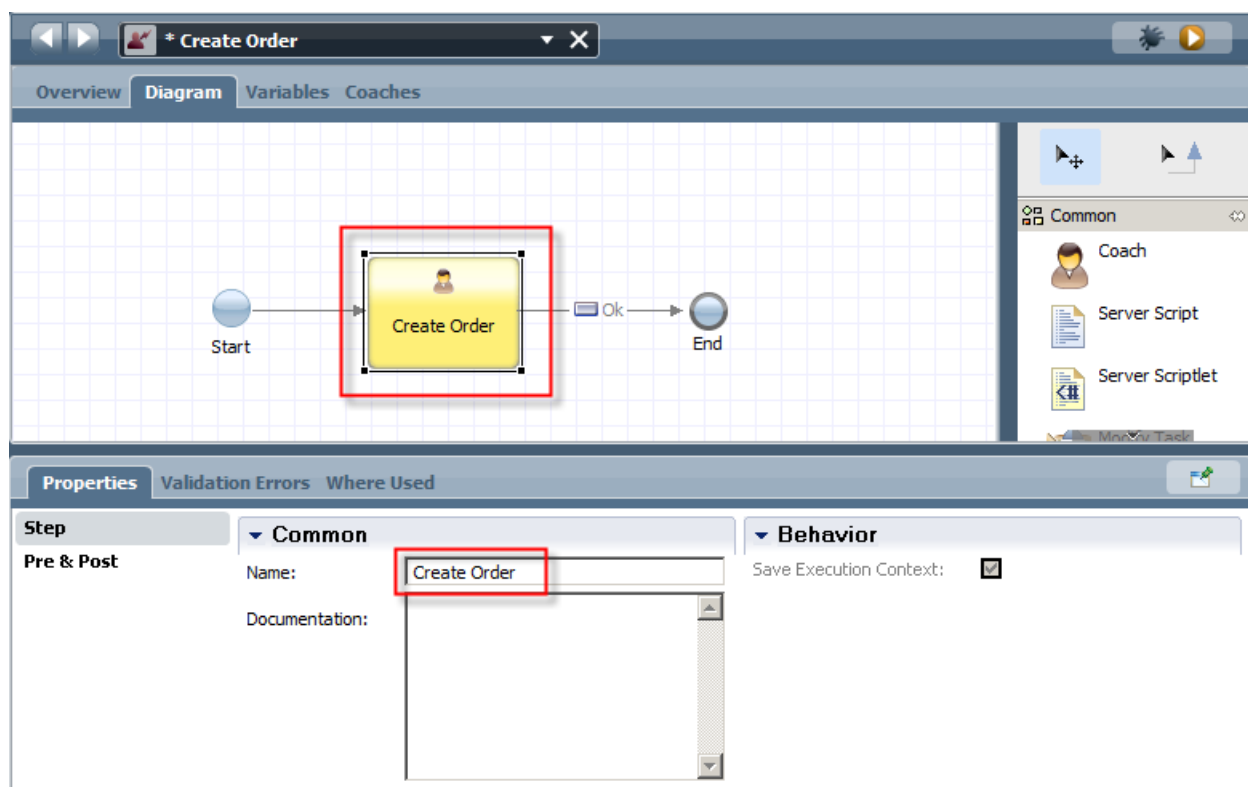
1.2.7 Update the *Create Order* User Interface

The Activity Wizard created a user interface with a single user interface screen, or “coach.” Your next task is to modify the UI screen.

- __1. In the Process Diagram, double-click on the *Create Order* activity to open the user interface.



- __2. Click on the *Coach* object, and in the Properties pane, change the name of the coach to *Create Order*.



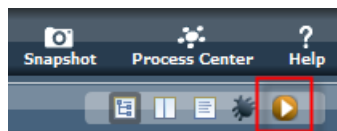
- __3. Modify the coach
- __a. Double-click on the *Create Order* coach to open the Coach Editor.
- You don't need the *Approved* and the *Vendor Response* fields.

- __b. Right-click on the *Approved* field and select *Delete*.

- __c. Repeat for the *Vendor Response* field.

The user interface can be run at any time. Running the user interface runs the entire user interface flow. Since there is only one coach in the current user interface, only the one screen will be displayed.

- __d. Save your work.
- __e. Click on the *Run* button in top right corner.



The screen is displayed. The screen is acceptable but there are a few changes to make. First, the users would prefer the *Priority* field be a drop-down list. Second, the *Issue Date* is system generated and should not be changed. Third, the user would like the *Planner Comments* field to have multiple lines. Finally, you think the screen would look a little nicer if there were two columns for the fields.

Create Order - Mozilla Firefox

File Edit View History Bookmarks Tools Help

http://bpm75:9080/teamworks/fauxRedirect.lsw?ap

Process Center Process Portal Process Admin Business Space Admin Console BPC Explorer

Create Order

Create Order

Order

Customer:

1 Priority:

2 Issue Date: 6/15/2011

Material Desc:

Total Qty: 0

Quote Deadline Date: 6/15/2011

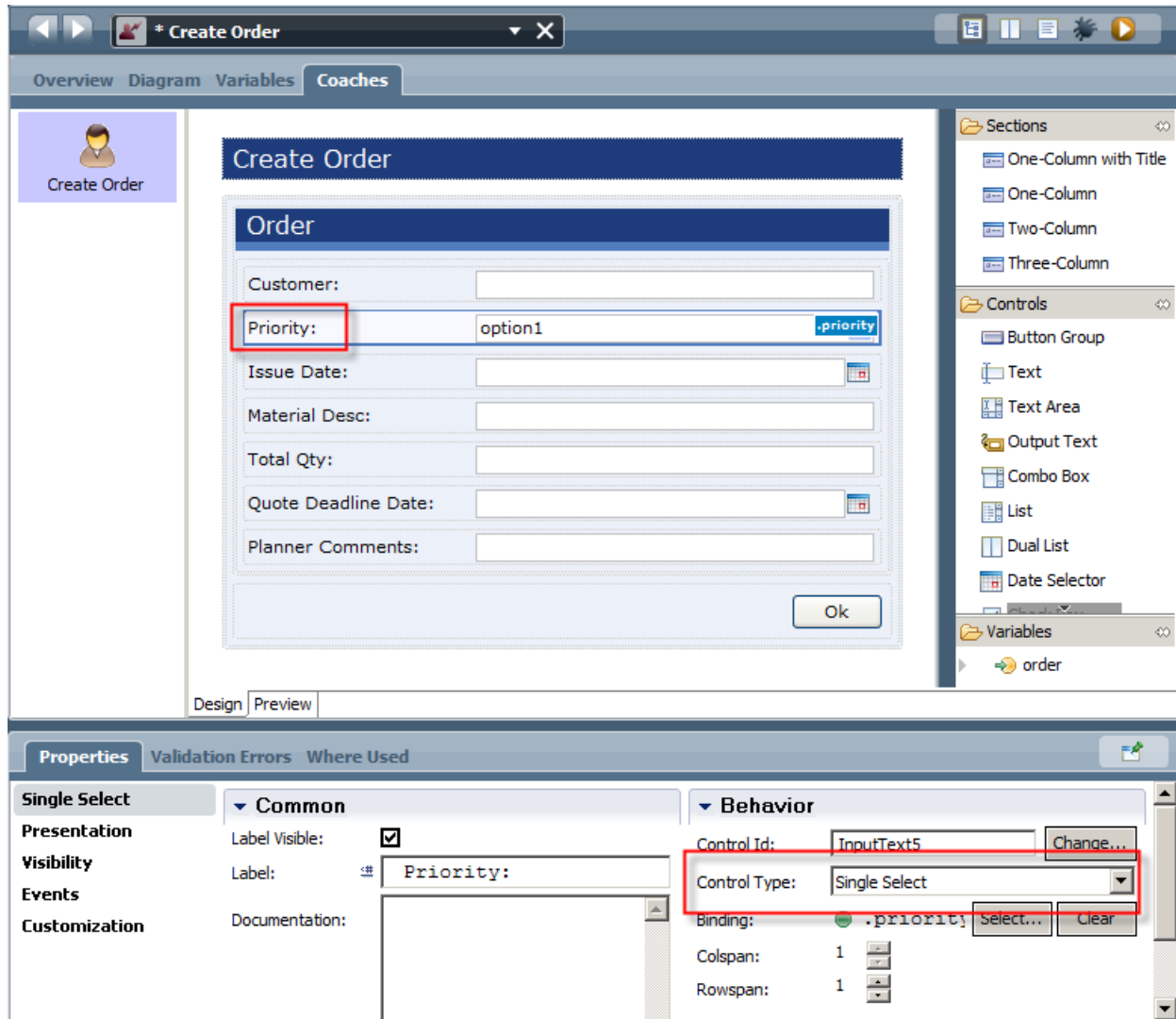
3 Planner Comments:

Ok

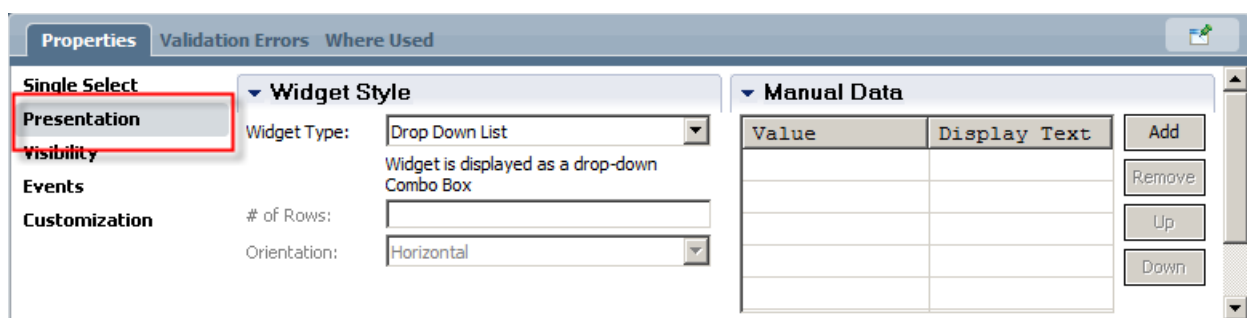
Done

__f. Click *OK* and close the browser window.

- __4. Change the *Priority* field to a drop-down list.
- __a. Click on the *Priority* field.
- __b. In the Properties pane, change the *Control Type* to *Single Select*.



- __c. In the Properties pane, click on the *Presentation* tab.



The next step is to define the options in the drop-down list. This list could be populated from a variable or from a database. In this lab, you define the options directly in the control.

- __d. In the Manual Data area, click the *Add* button.
- __e. In the *Value* field, clear the contents.
- __f. In the *Display Text* field, enter *-- Select a Priority --*

The screenshot shows a table titled "Manual Data" with two columns: "Value" and "Display Text". The first row is highlighted, and the "Add" button is visible to the right of the table. The "Value" field is empty, and the "Display Text" field contains "-- Select a Priority --".

Value	Display Text
	-- Select a Priority --

Buttons: Add, Remove, Up, Down

- __g. Repeat the steps to create the following entries:

Value	Display Text
3	Low
2	Medium
1	High

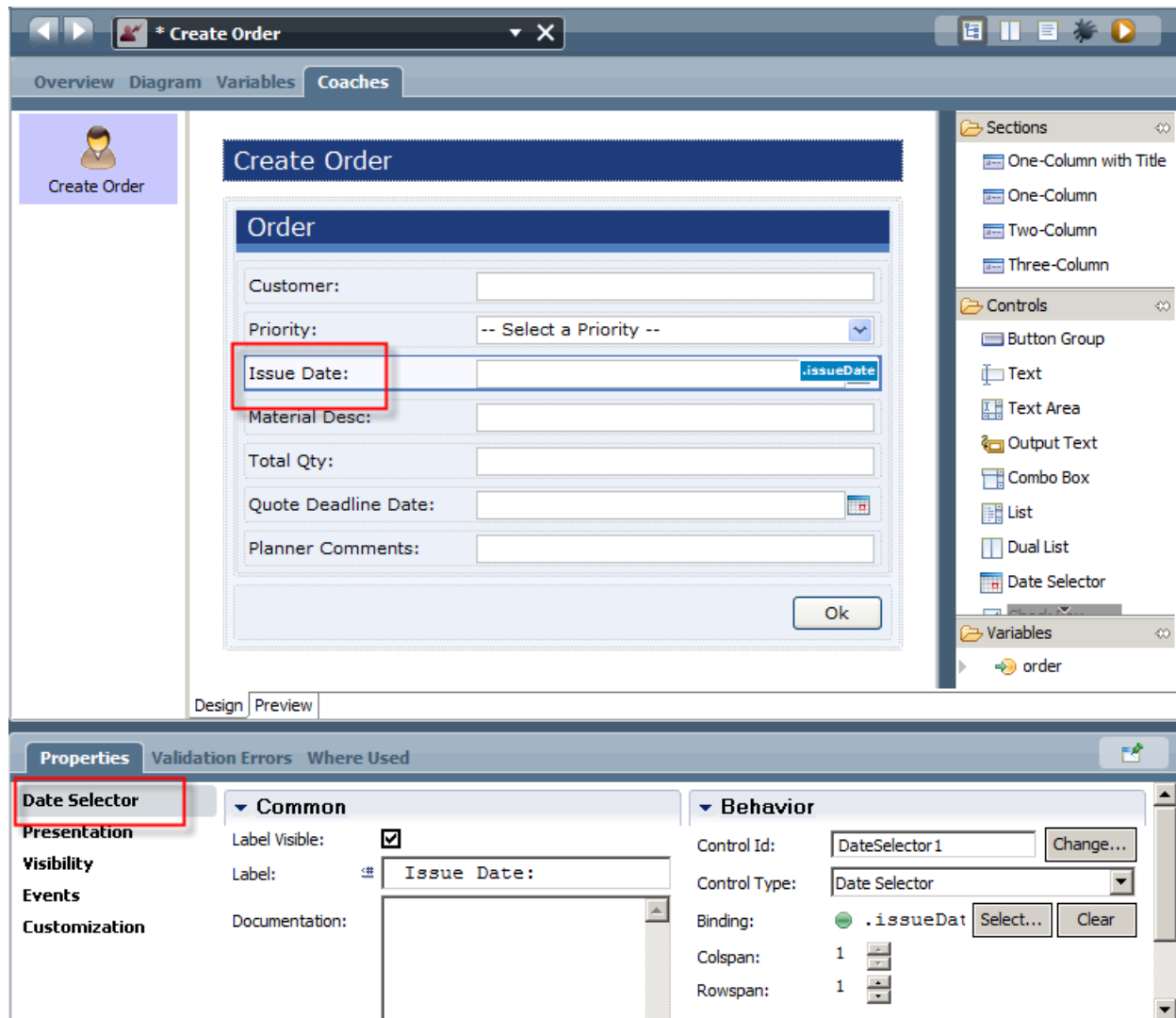
When you are finished, your screen should look like the following picture:

The screenshot shows the "Manual Data" table with three entries. The "Value" column contains 3, 2, and 1, and the "Display Text" column contains Low, Medium, and High. The "Add" button is still visible to the right of the table.

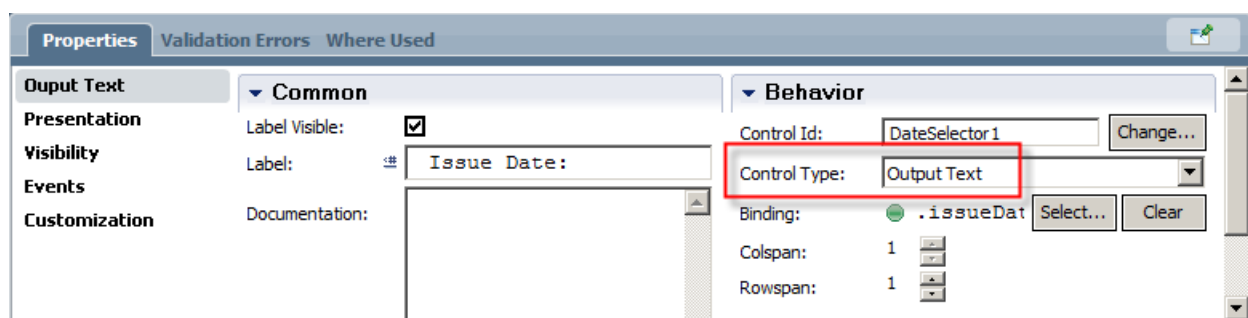
Value	Display Text
	-- Select a Priority --
3	Low
2	Medium
1	High

Buttons: Add, Remove, Up, Down

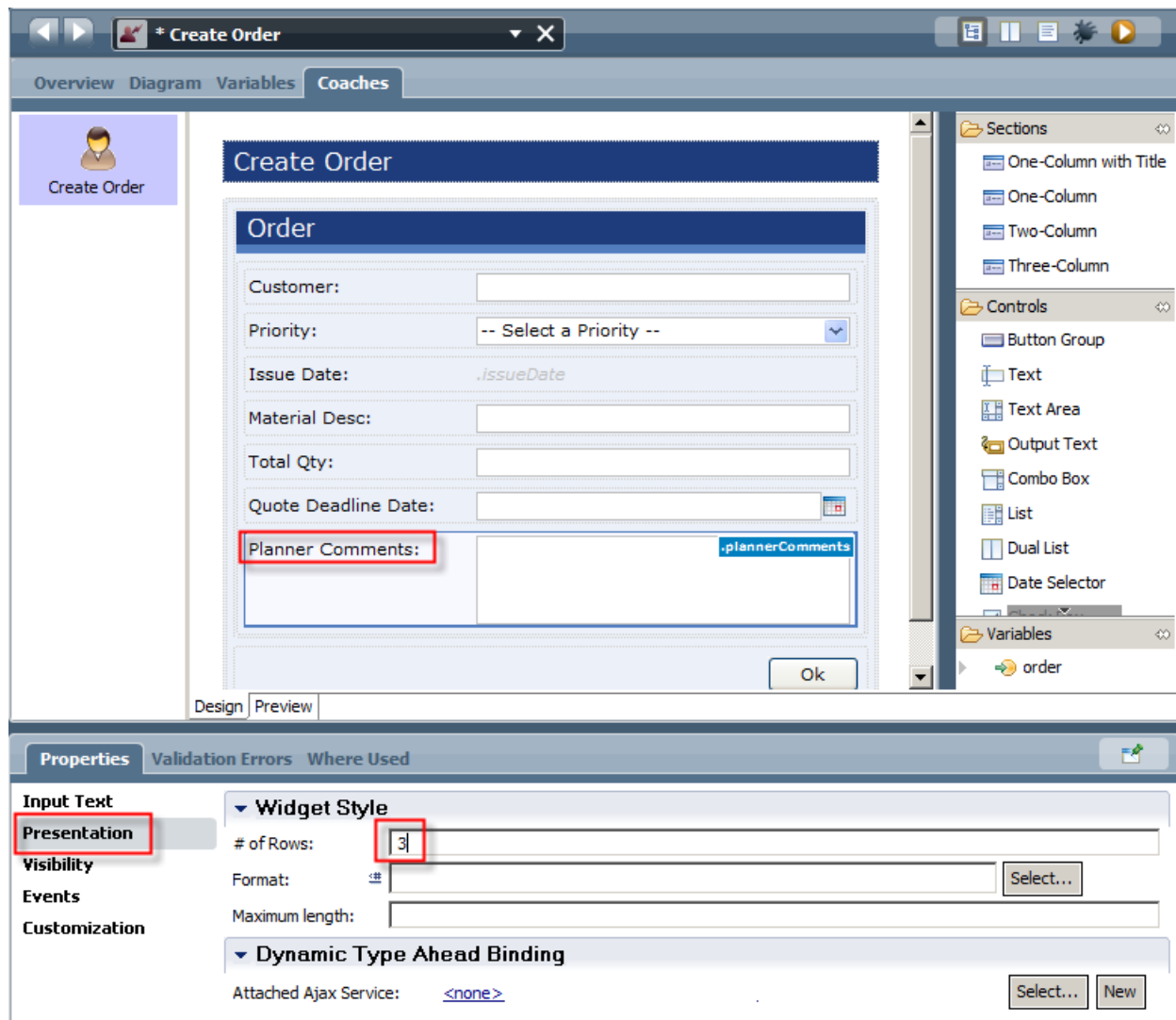
- __5. Change the *Issue Date* field to output text.
- __a. Click on the *Issue Date* field.
- __b. In the Properties pane, click on the *Date Selector* tab.



- __c. Change the *Control Type* to *Output Text*.

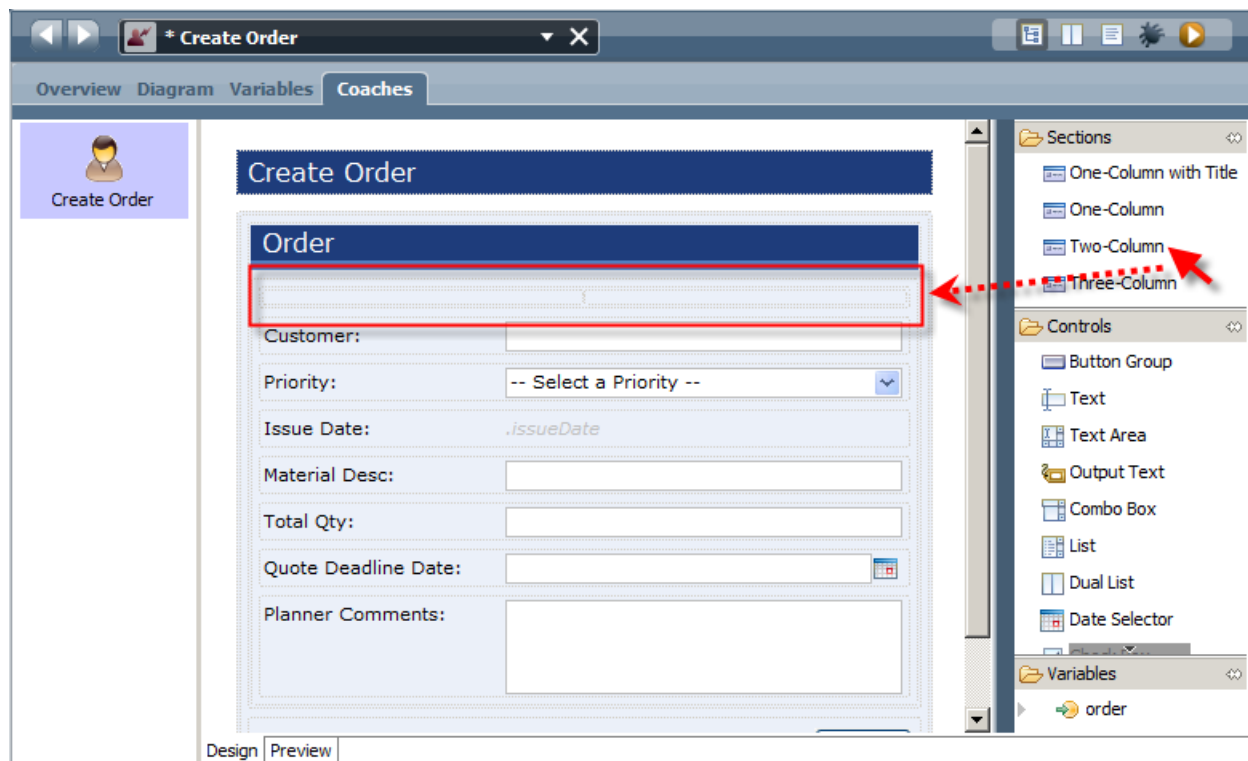


- __6. Increase the number of lines in the *Planner Comments* field to 3.
- __a. Click on the *Planner Comments* field.
 - __b. In the Properties pane, click on the *Presentation* tab.
 - __c. Change the # of Rows to 3.

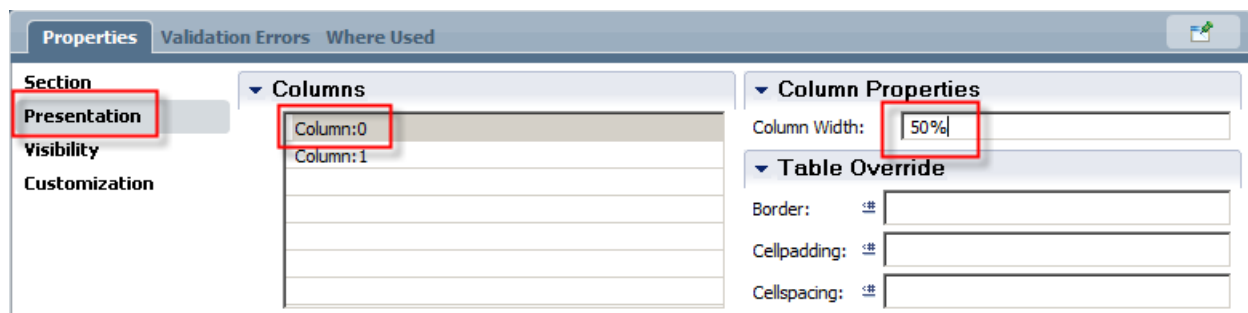


- __7. Place the upper fields into two columns.

- __a. Drag and drop a *Two-Column* control from the palette to the top of the *Order* section.

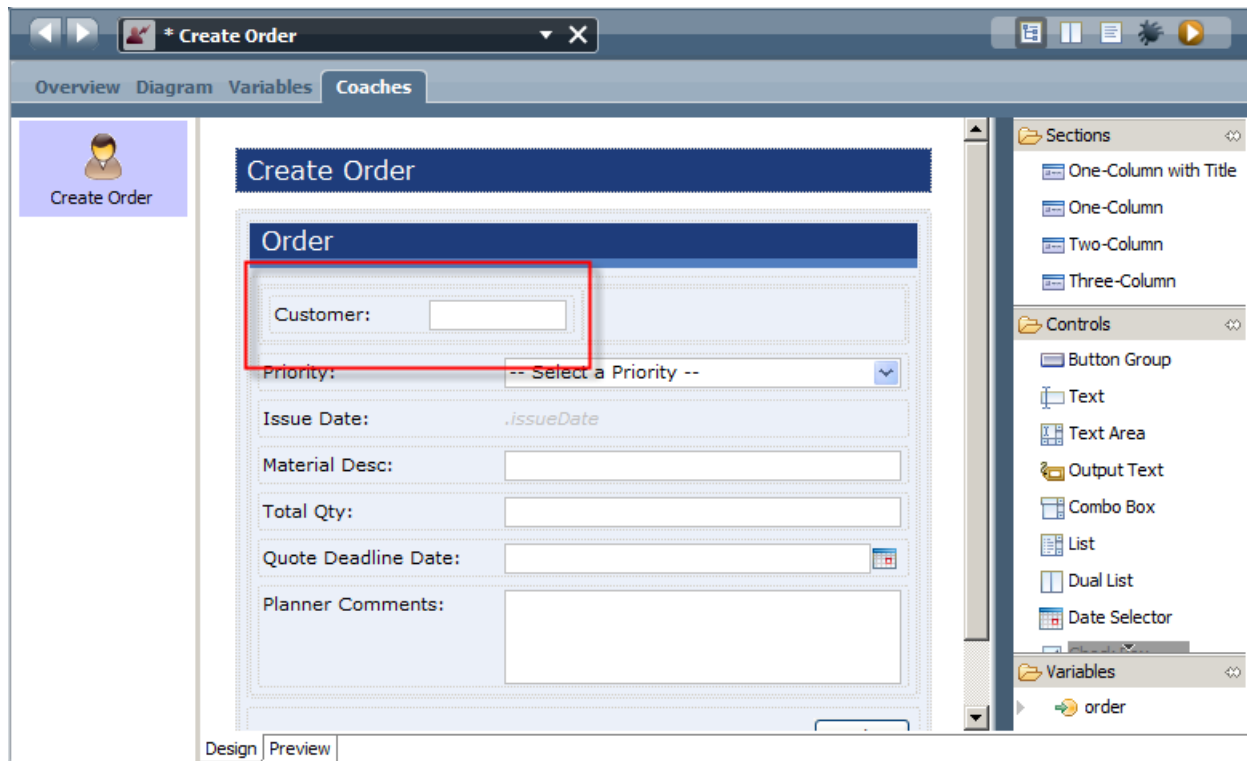


- __b. In the Properties pane, click on the *Presentation* tab.
- __c. Click on *Column:0*.
- __d. Set the *Column Width* to 50%.

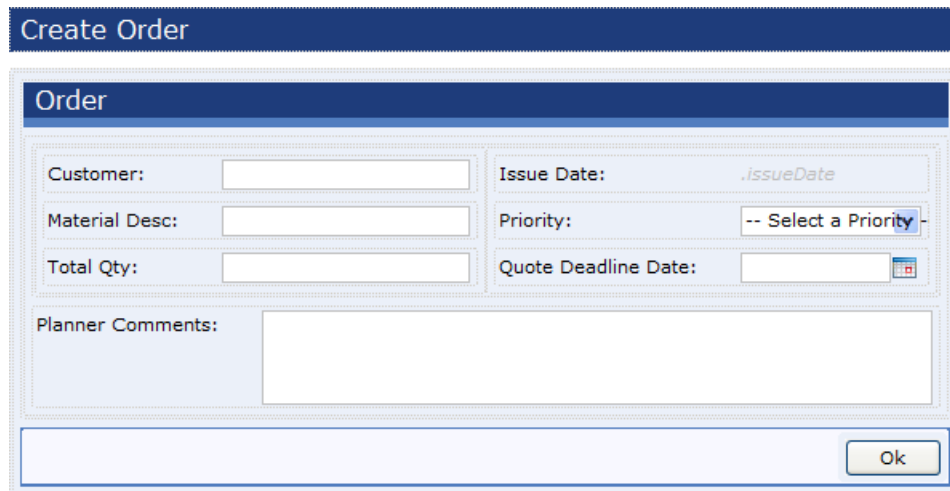


- __e. Repeats the steps for *Column:1*.

- __f. Drag and drop the *Customer* field into the left column.



- __g. Drag and drop the remaining fields (except for the *Planners Comments*) into the columns. Get your screen to look similar to the following picture:

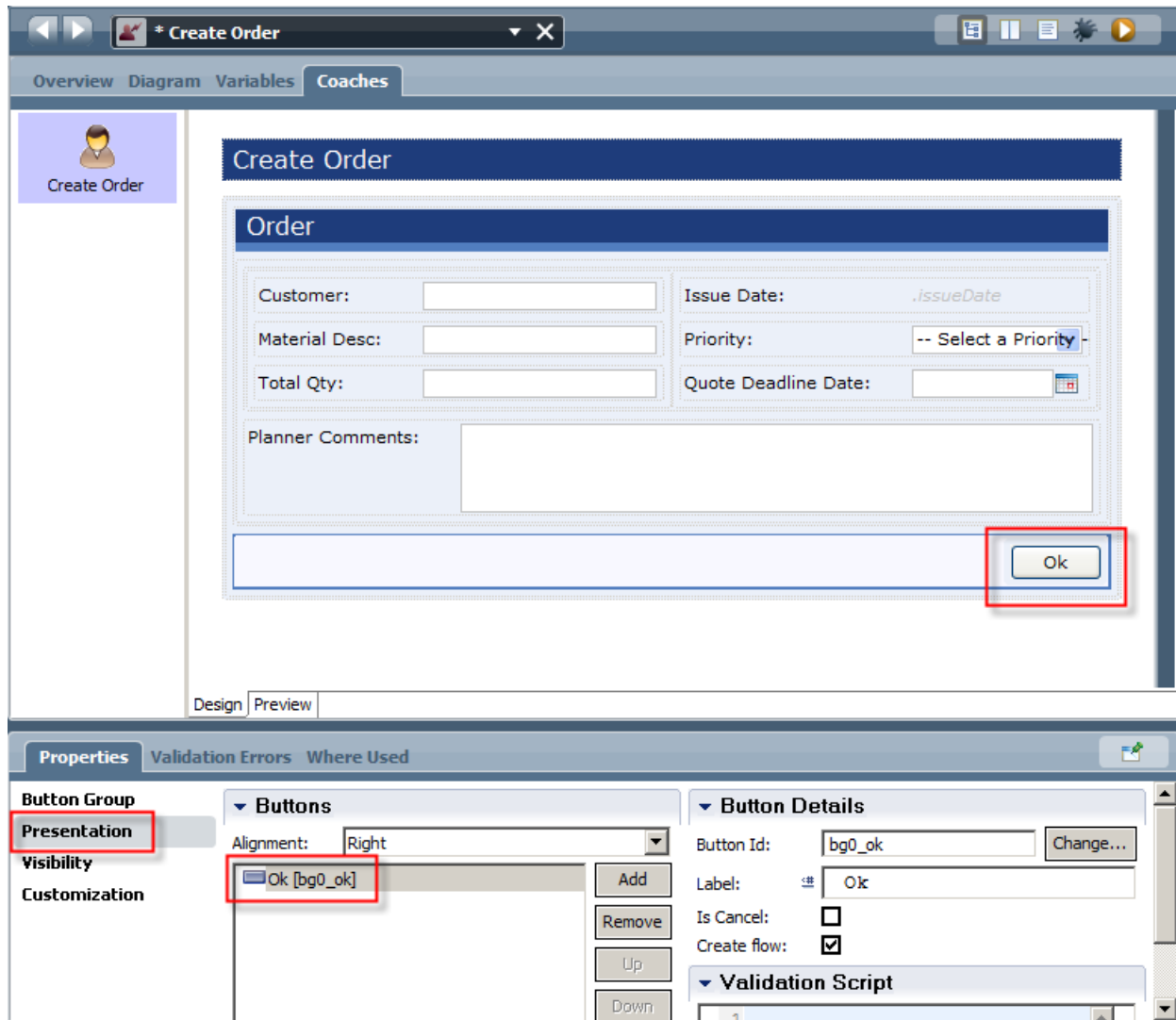


- __8. Save your work.
- __9. Click the *Run* button to test your changes. Close the browser window when you are finished.

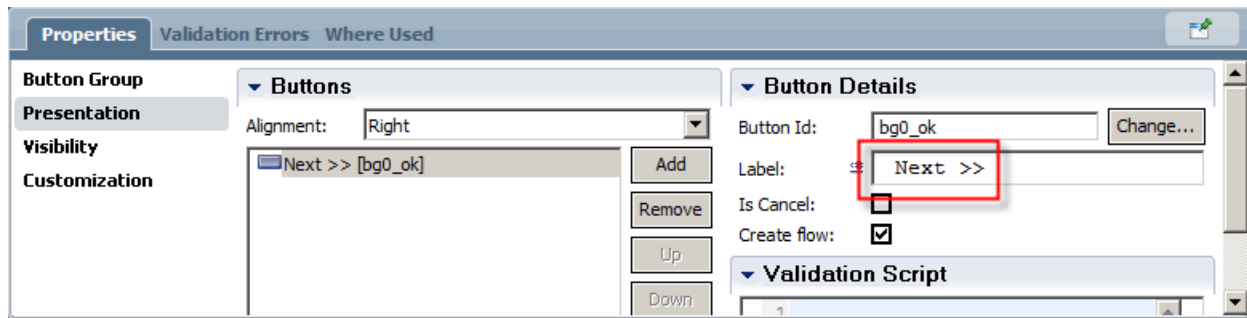
You have completed the update to the *Create Order* coach. There is an additional user requirement. Before the order is submitted for response, the system needs to show a review screen, giving the user the ability to go back and modify the order.

__10. Change the *Create Order* coach's button to display *Next >>* instead of *OK*.

- __a. Click on the *OK* button.
- __b. In the Properties pane, click on the *Presentation* tab.
- __c. In the *Buttons* area, click on the *Ok [bg0_ok]* button.



- __d. Change the *Label* to *Next >>*. (Note: There is a space between *Next* and *>>*)



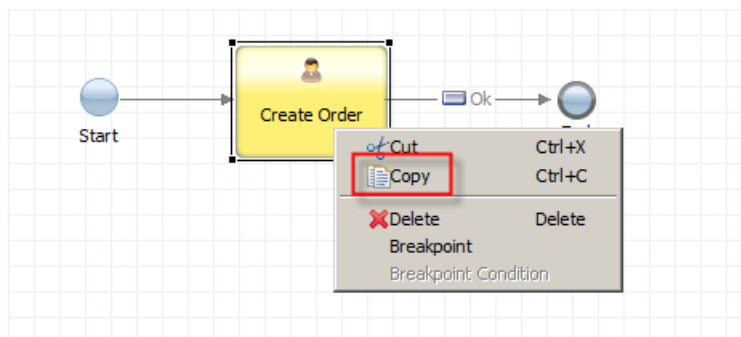
- __11. Click on the *Diagram* tab at the top of the screen.



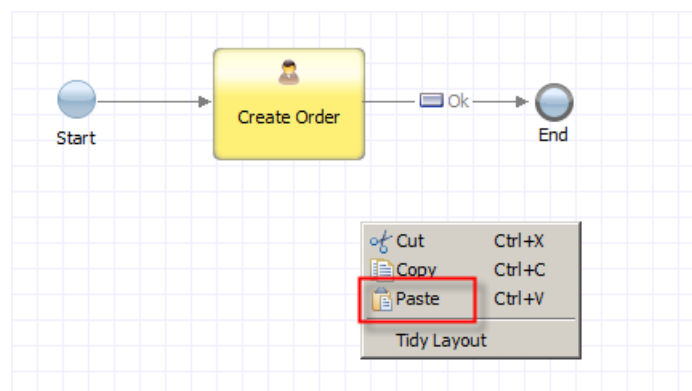
Since the Review Screen is basically a read-only version of the Create Order Coach, you will copy the create coach and modify it for the review coach.

- __12. Create a copy of the *Create Order* coach.

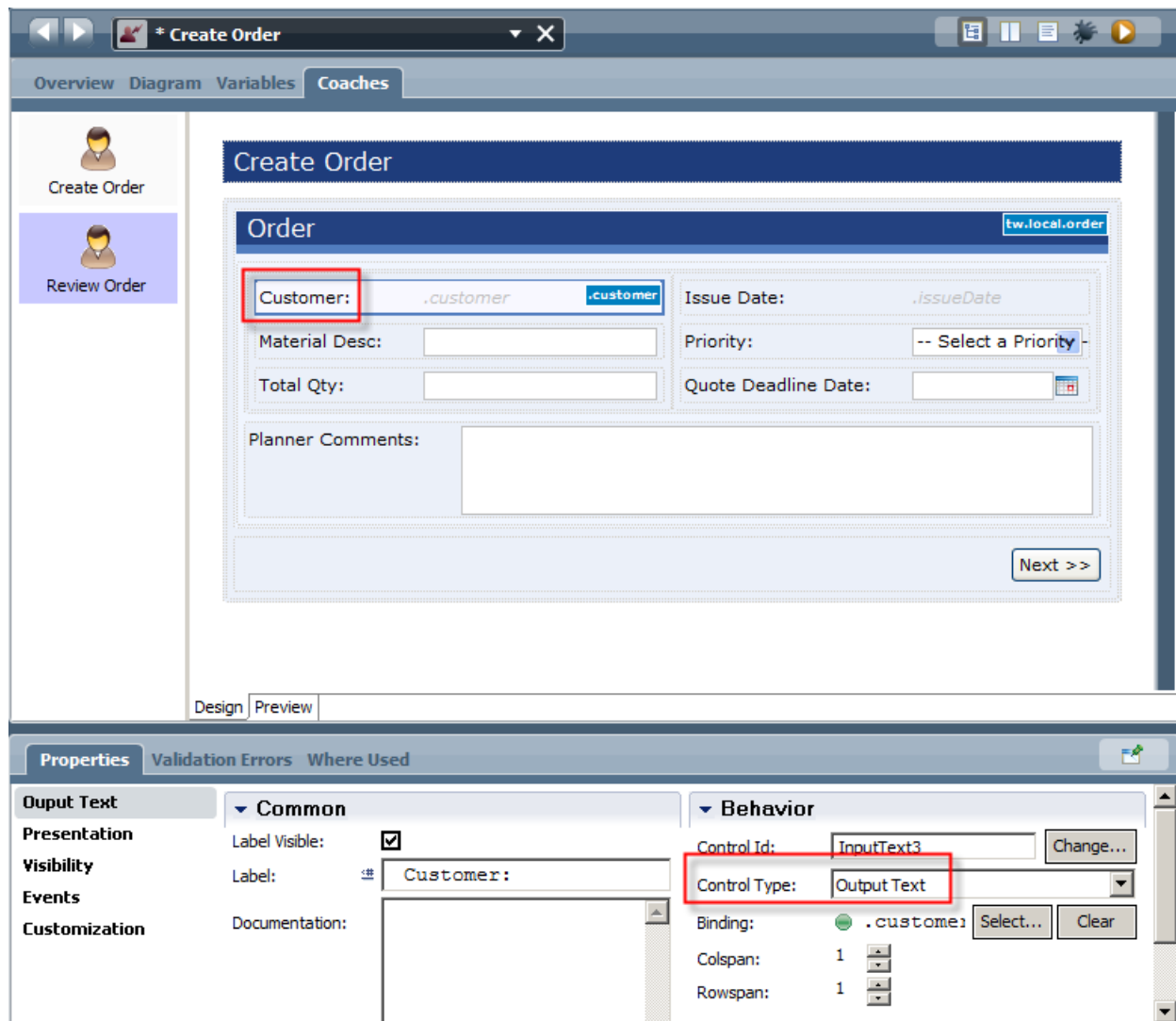
- __a. Right-click on the *Create Order* coach, and select *Copy*.



- __b. Click on the open diagram area, and then right-click, and select *Paste*.

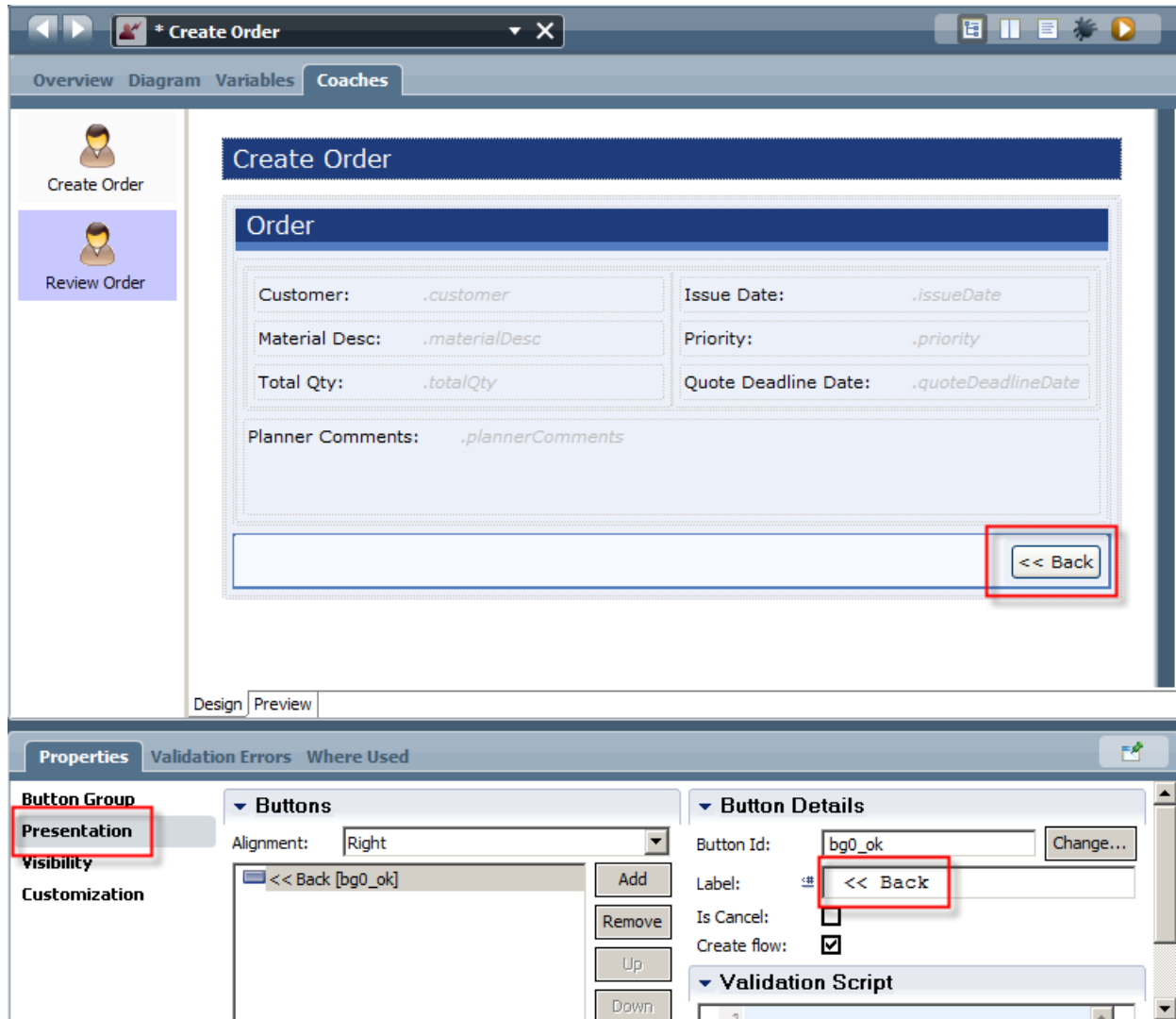


- __c. In the Properties pane, change the name of the Coach to *Review Order*.
- __13. Modify the *Review Order* coach.
 - __a. Double-click on the *Review Order* coach.
 - __b. Click on the *Customer* field.
 - __c. In the Properties pane, change the *Control Type* to *Output Text*.

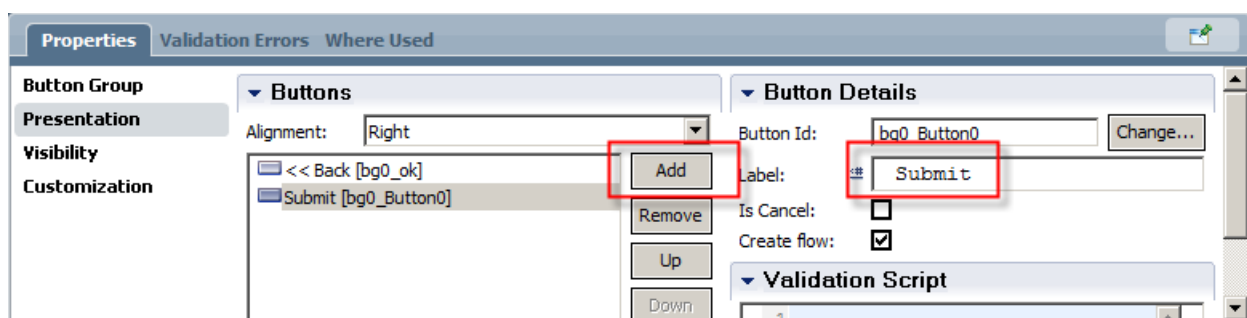


- __d. Repeat for all of the remaining fields.

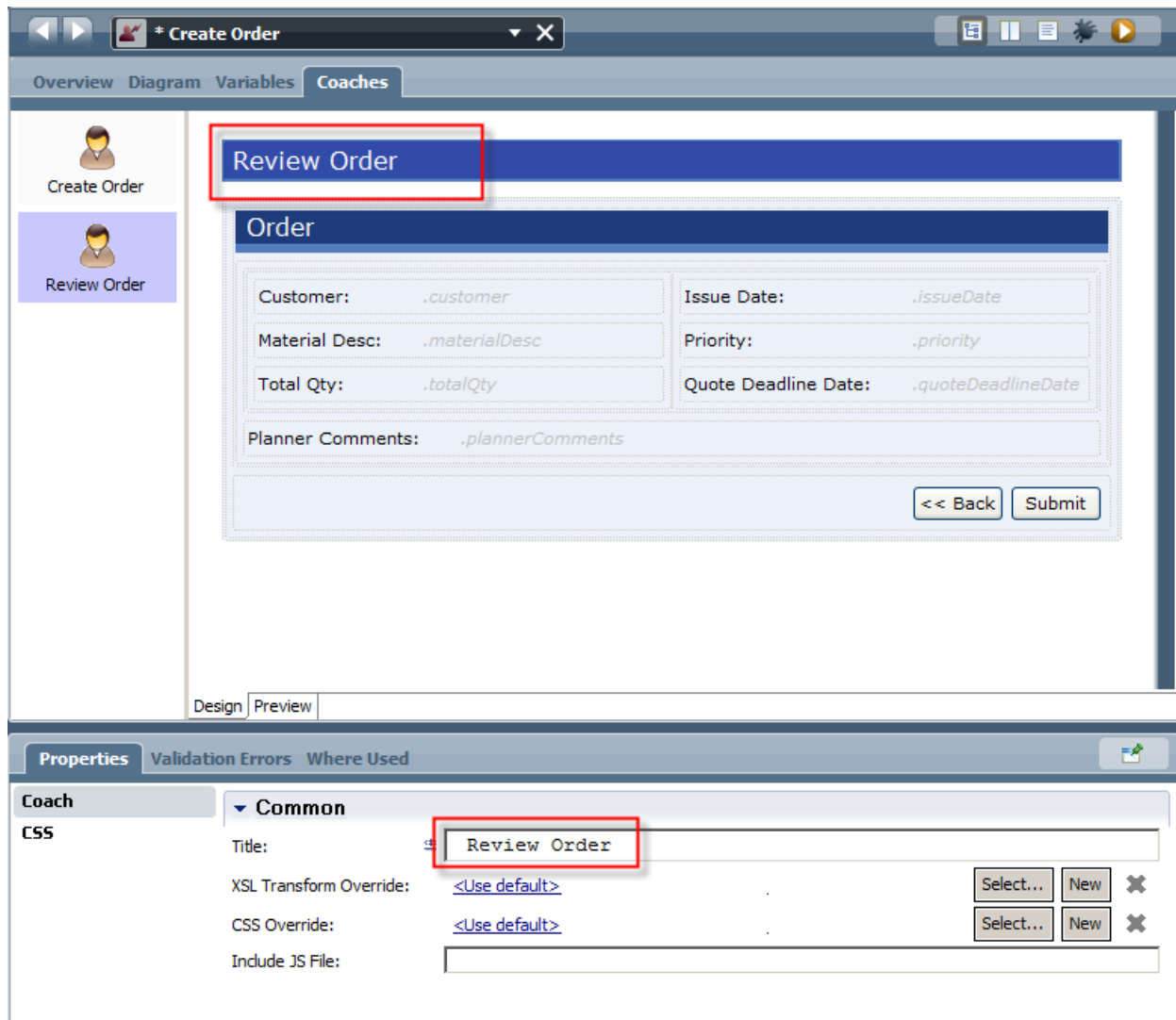
- __e. Click on the *Next >>* button.
- __f. In the Properties pane, click on the *Presentation* tab.
- __g. Change the *Label* of the *Next >>* button to *<< Back*. (Remember the space.)



- __h. In the *Buttons* area, click the *Add* button and change the new button's label to *Submit*.



- __i. Click on the *Create Order* title bar at the top of the Coach.
- __j. Change the title to *Review Order*.

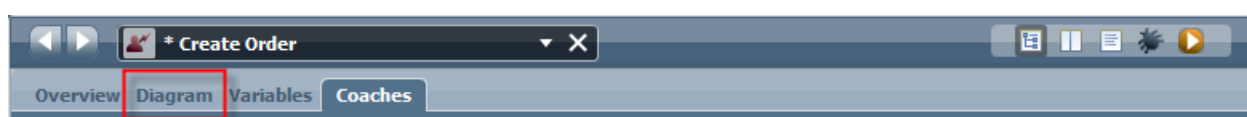


- __k. Save your work.

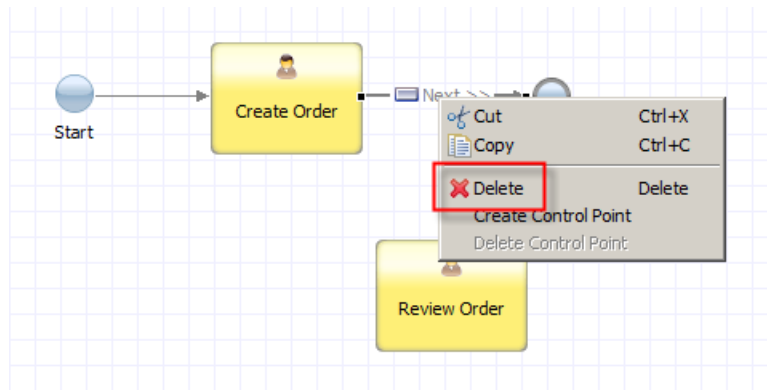
If you were to press the *Run* button, you would not see your new review Coach. Why? The new Coach has not been added to the user interface flow.

- __14. Add the *Review Order* coach to the user interface flow.

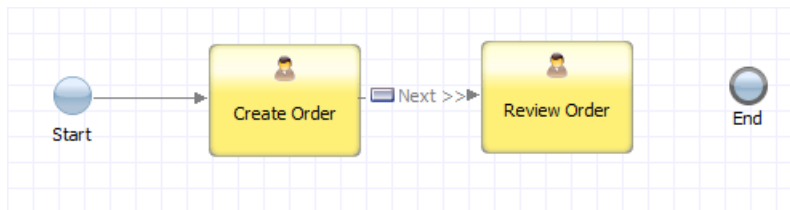
- __a. Click on the *Diagram* tab.



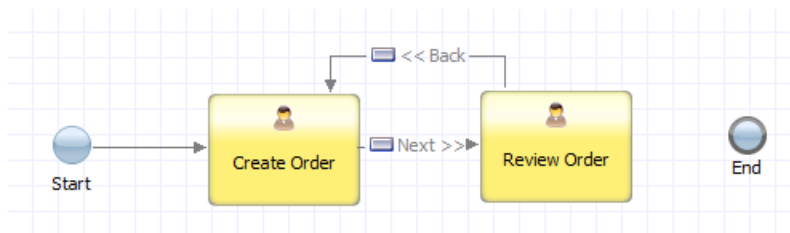
- __b. Right click on the *Next >>* connection line, and select *Delete*.



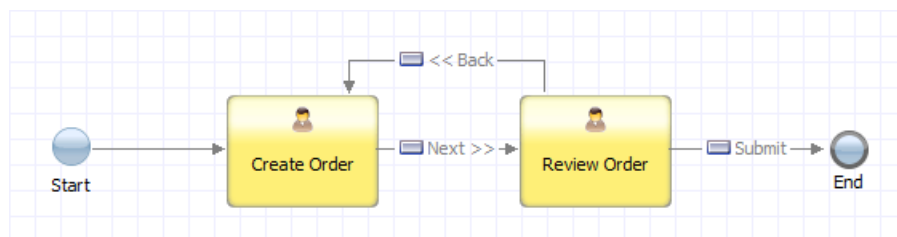
- __c. Use the *Sequence Flow* tool to connect the *Create Order* coach to the *Review Order* coach. (You may need to move the *End* event to make room for the *Review Order* coach.)



- __d. Connect the *Review Order* coach back to the *Create Order* coach.



- __e. Finally, connect the *Review Order* coach to the *End* event.

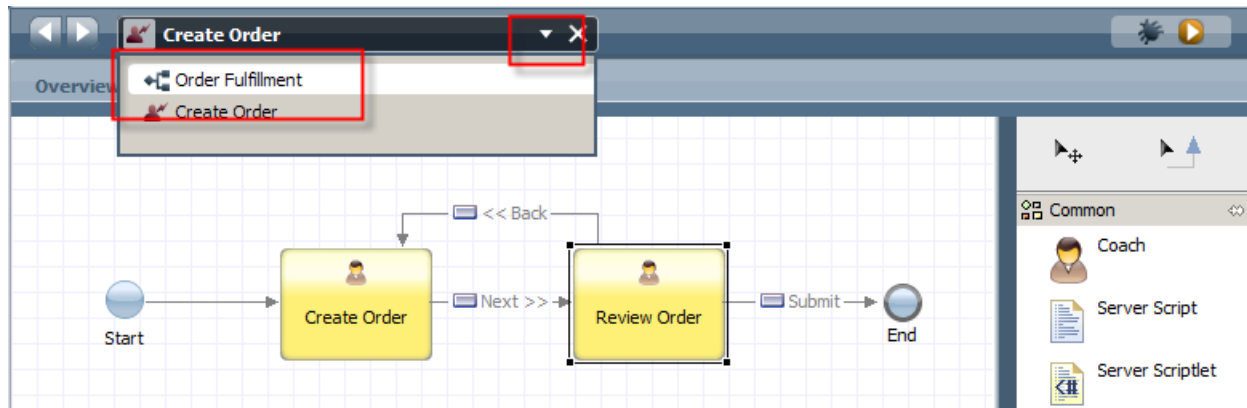


- __15. Test the final product.

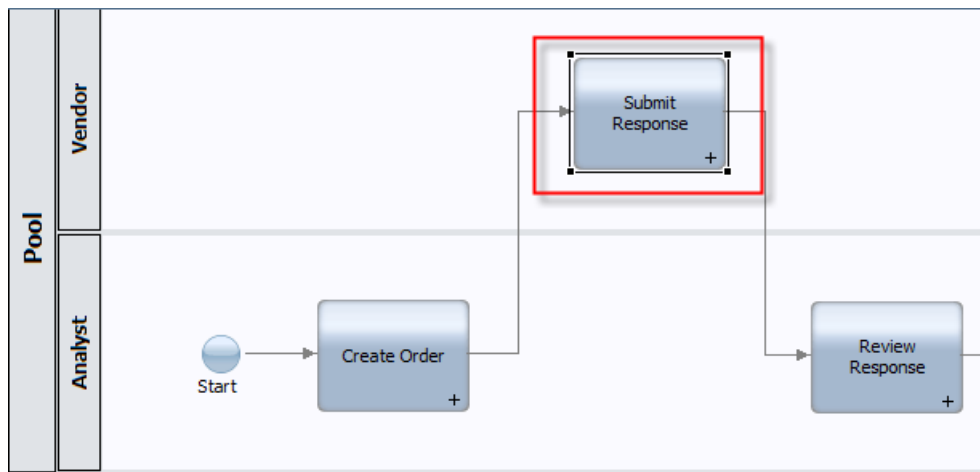
- __a. Save your work.
- __b. Click the *Run* button. Close the browser window when you are finished.

1.2.8 Update the *Submit Response* User Interface

- __1. Switch back to the Business Process Diagram.
 - __a. Click on the down arrow next to *Create Order* at the top of the screen.
 - __b. Select *Order Fulfillment*.

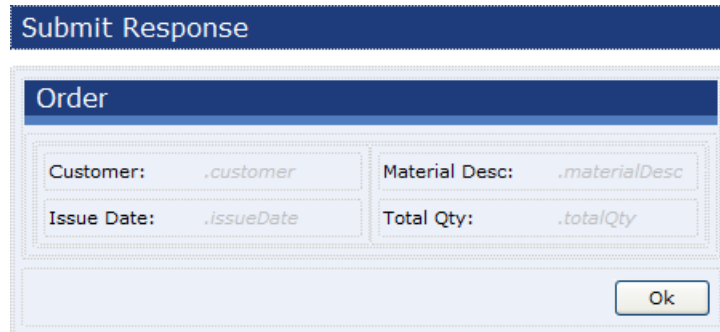


- __2. Double-click on the *Submit Response* activity.

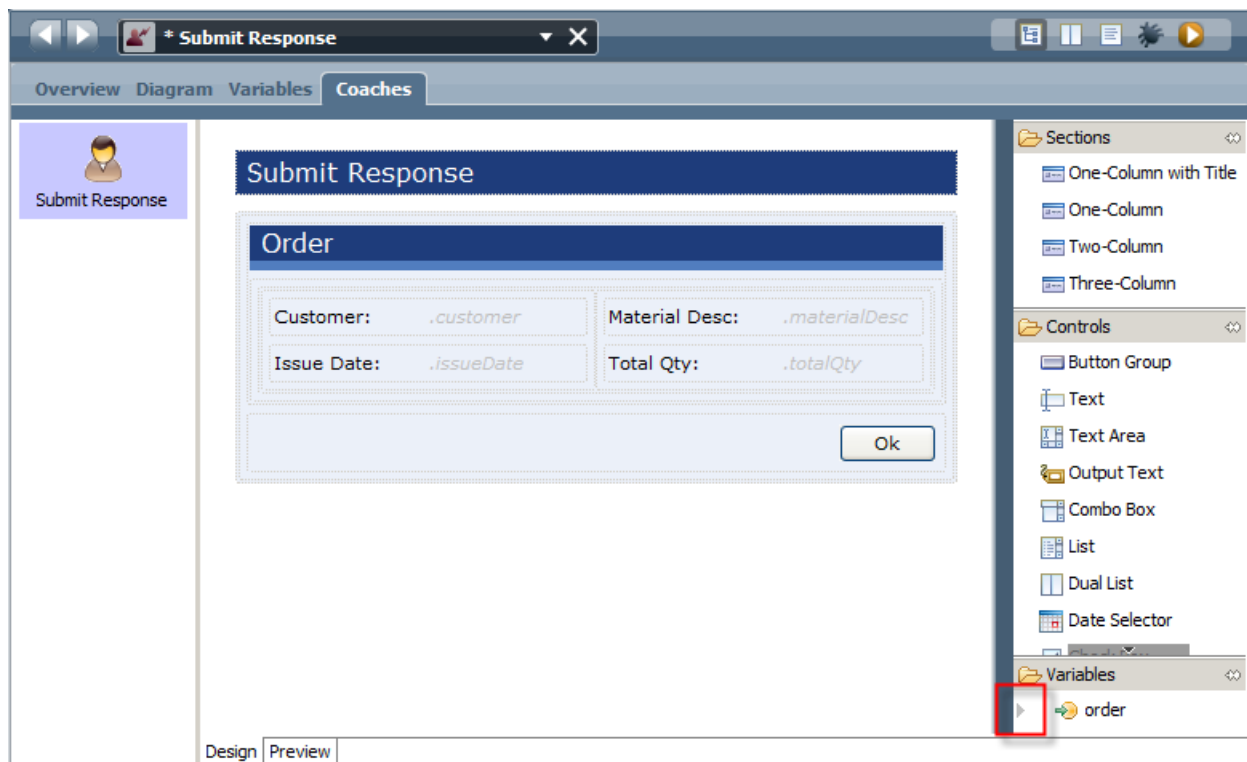


- __3. Change the name of the Coach to *Submit Response*. (Properties pane)
- __4. Double-click on the *Submit Response* coach.
- __5. Modify the *Order* section.
 - __a. Delete the *Priority*, *Quote Deadline*, *Planner Comments*, *Approved*, and *Vendor Response* fields.
 - __b. Change the remaining fields to *Output Text*. (Properties pane)
 - __c. Add a *Two-Column* control to the top of the section.

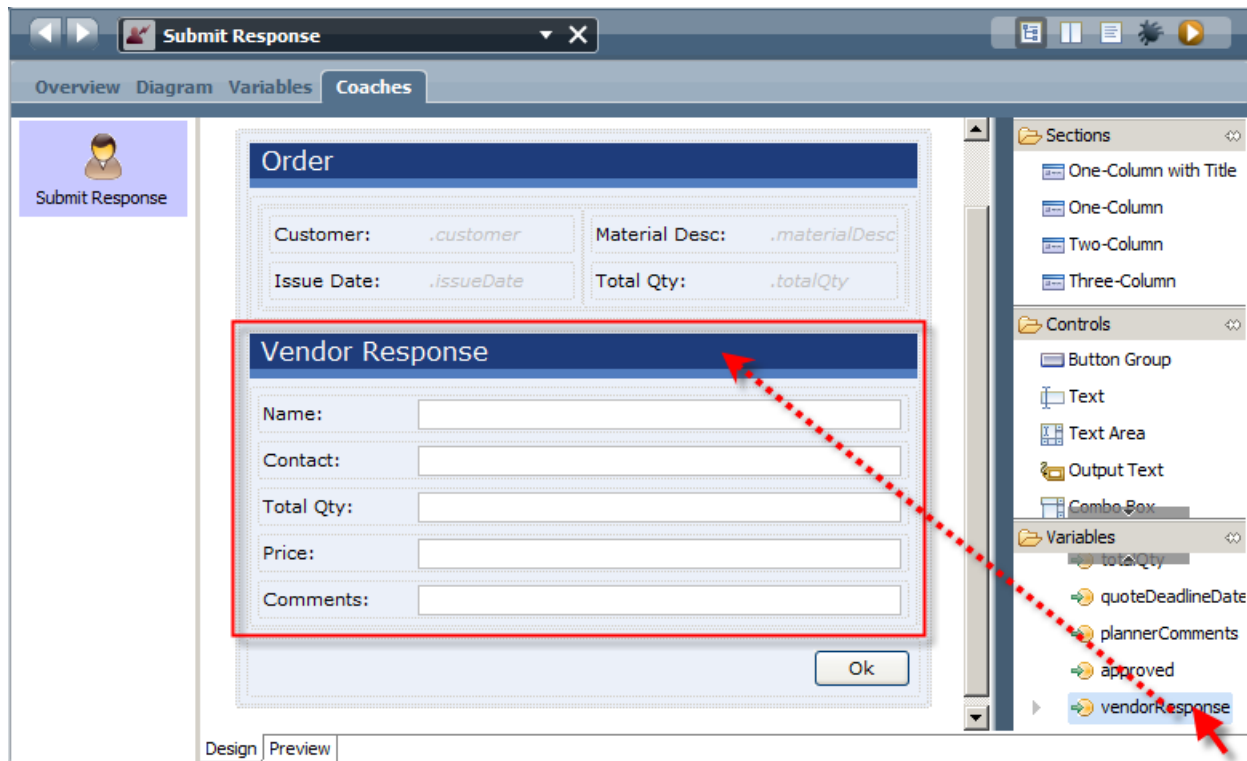
- __d. Set the column widths to 50%. (Properties pane, Presentation tab)
- __e. Drag and drop the fields into the columns. When you are finished, your coach should look similar to the following picture:



- __6. Add the *Vendor Response* section.
 - __a. Expand the *order* variable in *Variables* folder in the palette by clicking on the triangle next to the *order* variable.

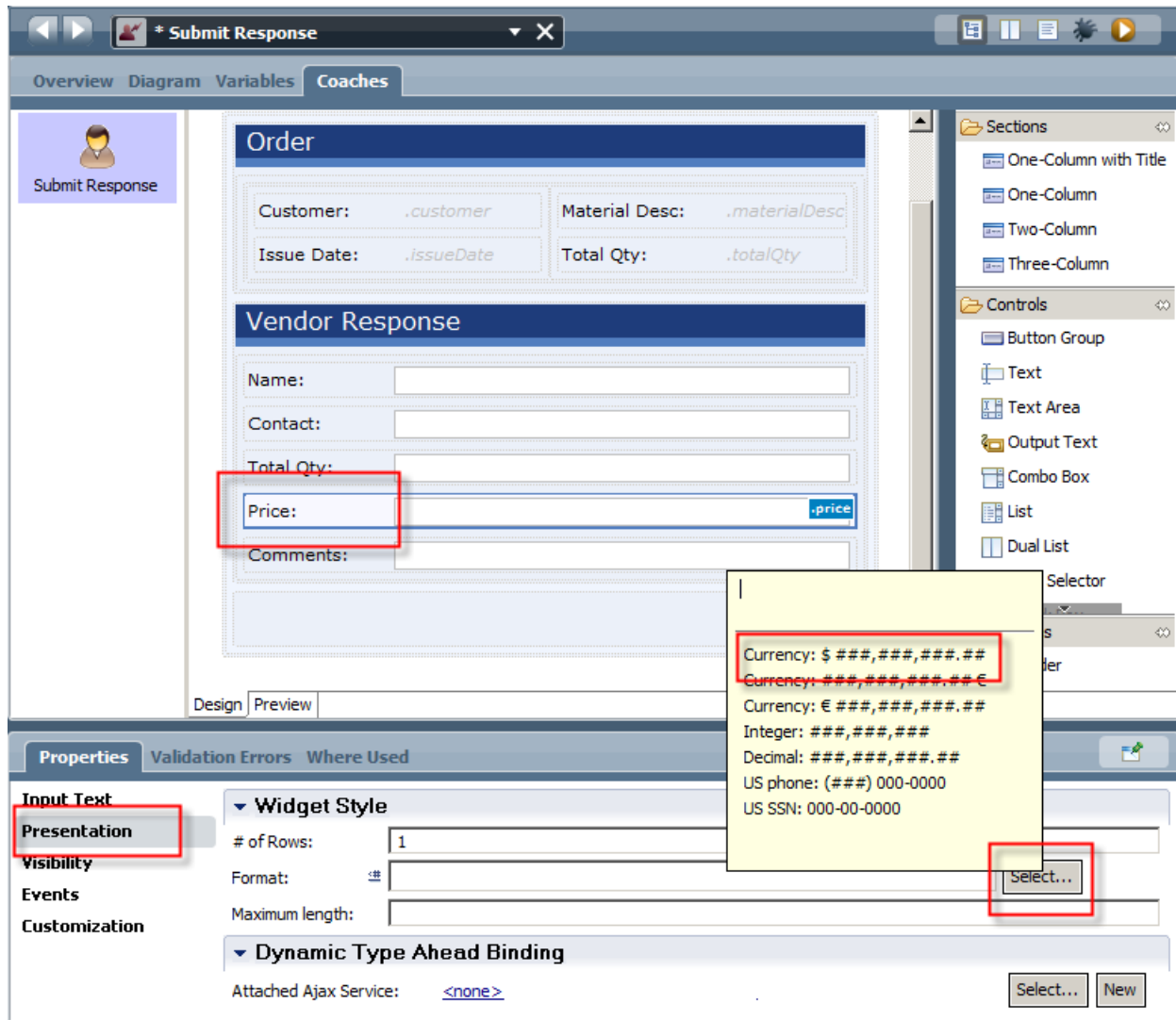


- ___b. Scroll down to the *vendorResponse* variable and drag and drop the variable between the *Order* section and the *Ok* button group.

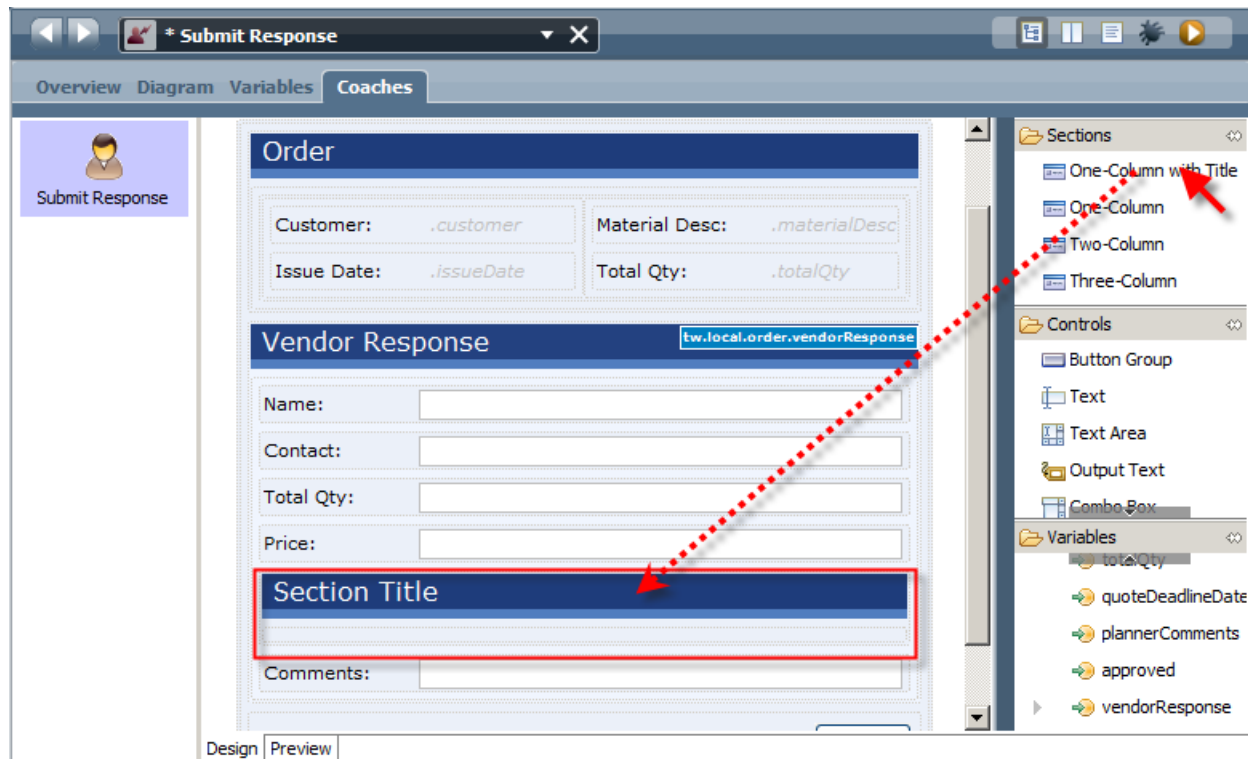


Notice that this action created a section for the variables content, as well as creating entry fields for all of the first-level attributes.

- __c. Format the *Price* field to display the value as currency.
- __i. Select the *Price* field.
- __ii. In the Properties pane, click on the *Presentation* tab.
- __iii. Click on the *Select* button, and select *Currency: \$###,###,###.##*.

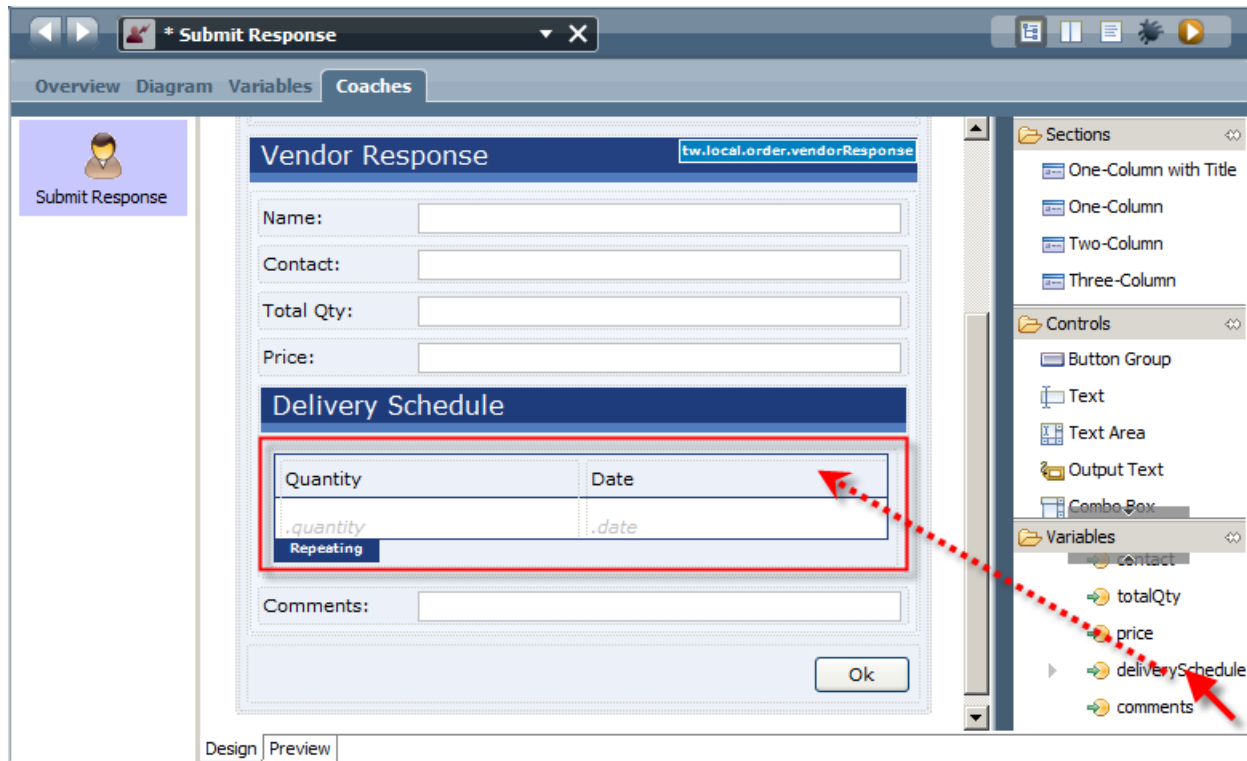


- ___d. Drag and drop a *One-Column with Title* control and drop it between the *Price* field and the *Comments* field.



- ___e. Change the *Title* of the new section to *Delivery Schedule*. (Properties pane, Section tab)

- ___f. Expand the *vendorResponse* variable in *Variables* folder in the palette by clicking on the triangle next to the *vendorResponse* variable.
- ___g. Scroll down to the *deliverySchedule* variable and drag and drop the variable into the *Deleivery Schedule* section.



You now have the basic information on the Coach. It is time for a playback.

- ___h. Save your work.

__i. Click the *Run* button.

Submit Response - Mozilla Firefox

File Edit View History Bookmarks Tools Help

http://bpm75:9080/teamworks/fauxRedirect.lsw?applicationInstanceId

Process Center Process Portal Process Admin Business Space Admin Console BPC Explorer

Submit Response

Submit Response

Order

Customer: Material Desc:

Issue Date: Jun 16, 2011 Total Qty: 0

Vendor Response

Name:

Contact:

Total Qty:

Price:

Delivery Schedule

Quantity	Date
0	Jun 16, 2011

Comments:

Ok

Done

Submit Response

Order

Customer:

Material Desc:

Issue Date: Jul 3, 2011

Total Qty: 0

Vendor Response

Name:

Contact:

Total Qty: 0

Price: \$ 0

Delivery Schedule

Quantity	Date
☐ 0	Jul 3, 2011

Comments:

Ok

The default table properties for the delivery schedule are not quite what you need. The fields need to be input fields, there is no need for the radio button, and you need to be able to add and delete rows.

- __j. Click the *Ok* button and close the browser window.

- __k. Click on the *Quantity* column.
- __l. In the Properties pane, change the *Control Type* to *Input Text*.

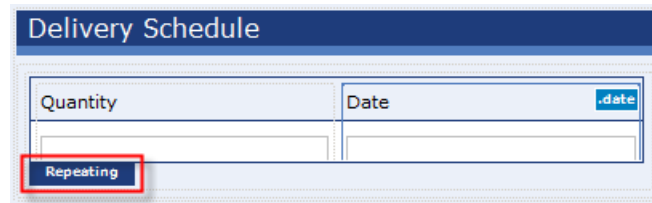
**Important!**

Do not press the “I” key on the keyboard to jump to the *Input Text* entry in the *Control Type* drop-down list. The first “I” in the list is *Image*, which will be selected. Since as image is not bound to a variable, you will loose the connection between the *Quantity* field and the *quantity* variable.

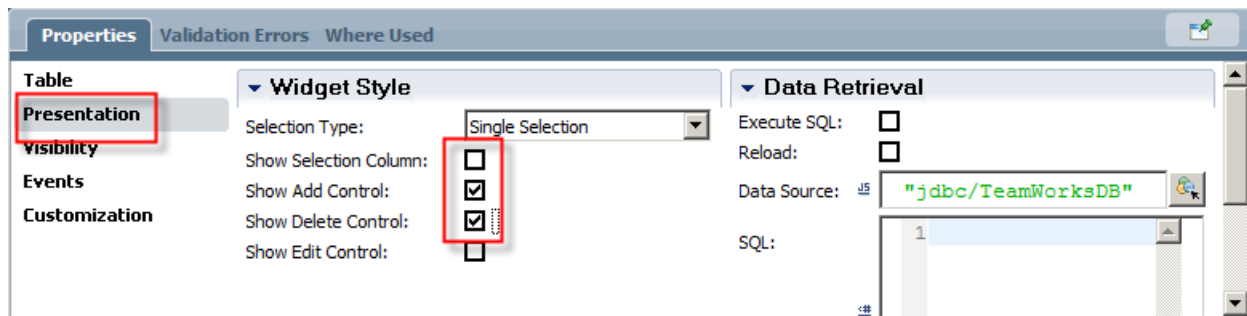
The screenshot displays the IBM BPM 7.5 Coaches interface. The main workspace shows a 'Submit Response' coach with a form titled 'Vendor Response'. The form includes fields for Name, Contact, Total Qty, Price, and a table for the Delivery Schedule. The 'Quantity' column in the table is highlighted with a red box. The Properties pane at the bottom is open, showing the 'Input Text' control type selected for the 'Quantity' field. The 'Common' section shows 'Label Visible' checked and 'Label' set to 'Quantity'. The 'Behavior' section shows 'Control Id' as 'TableCellquantity0', 'Control Type' as 'Input Text', and 'Binding' as '.quantity'. The 'Variables' pane on the right lists variables: contact, totalQty, price, deliverySchedule, and comments.

- __m. Change the *Control Type* for the *Date* column to *Date Selector*.

- __n. Select the table by clicking on the *Repeating* tag on the bottom of the table.



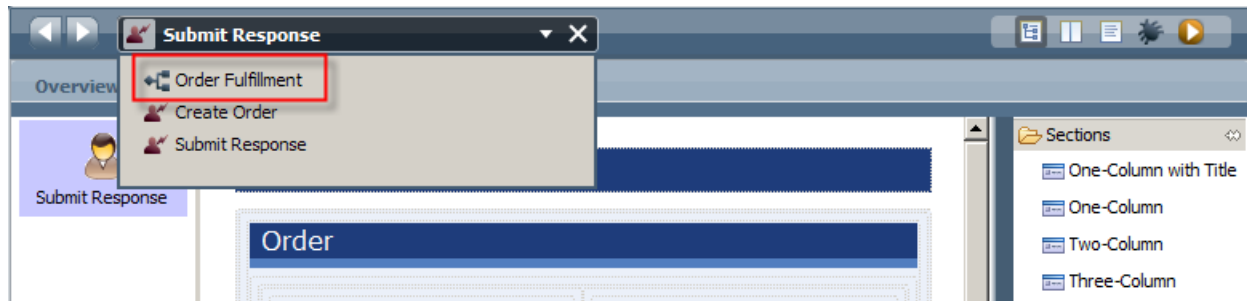
- __o. In the Properties pane, click on the *Presentation* tab.
- __p. Make the following changes:
- __i. Uncheck *Show Selection Column*.
 - __ii. Check *Show Add Control*.
 - __iii. Check *Show Delete Control*.



- __q. *Optional*:
- __i. Use a two-column control to group the top four fields in the *Vendor Response* section.
 - __ii. Increase the number of rows for the *Comments* field to 3.
- __r. Save your work.

1.2.9 Update the *Review Response* User Interface

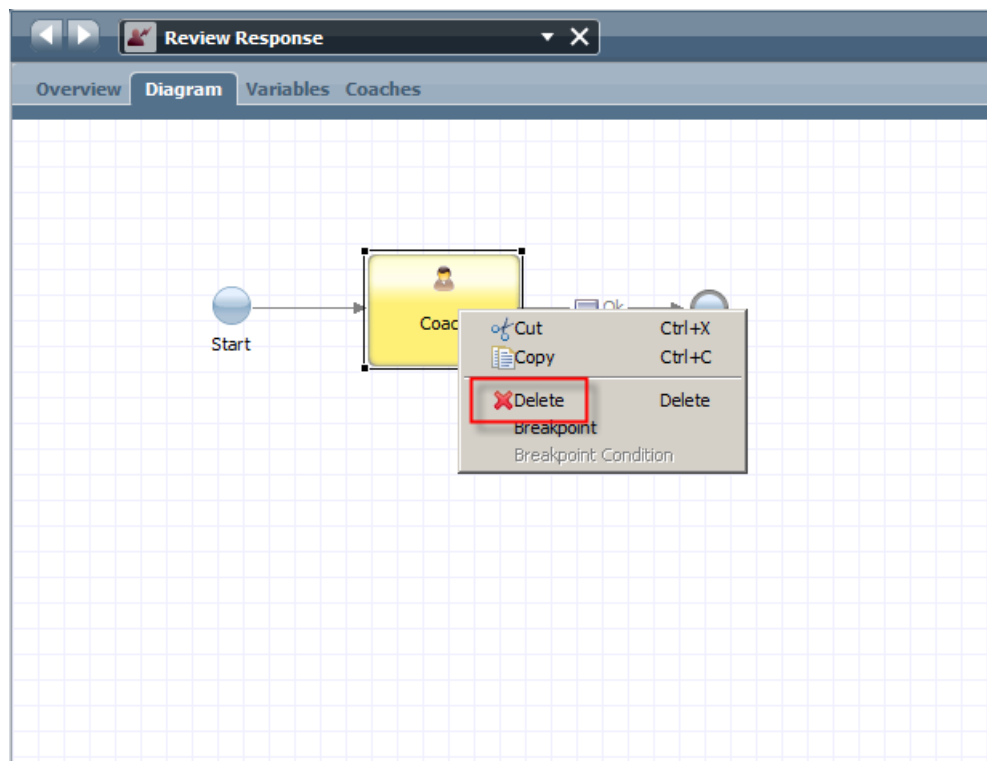
- __1. Switch back to the Business Process Diagram.
 - __a. Click on the down arrow next to *Create Order* at the top of the screen.
 - __b. Select Order Fulfillment.



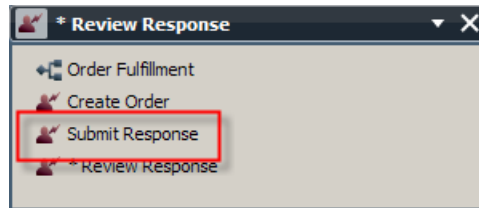
- __2. Double-click on the *Review Response* activity.

Since the Coach for the *Review Response* activity is very similar to the Coach that was created for the *Submit Response* activity, you will use a copy of the *Submit Response* coach as the starting point.

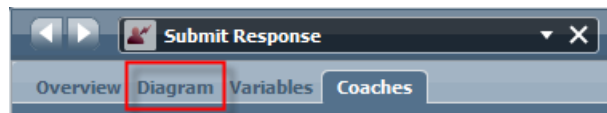
- __3. Replicate the *Submit Response* coach.
 - __a. Right-click on the *Coach* in the Review Response Diagram and select *Delete*.



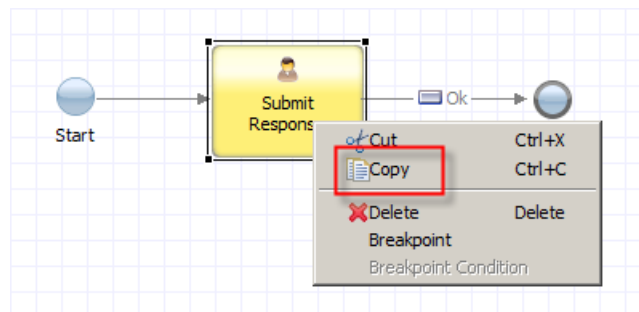
- ___b. Use the drop-down list at the top of the screen to switch to the *Submit Response* user interface.



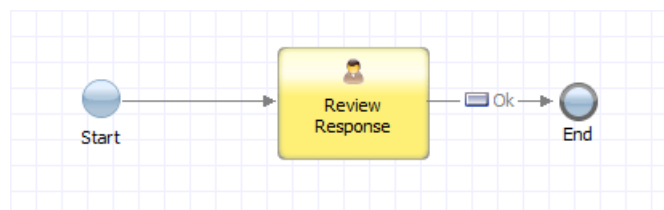
- ___c. If you are not viewing the coach flow, click on the *Diagram* tab.



- ___d. Right-click on the *Submit Response* Coach and select *Copy*.

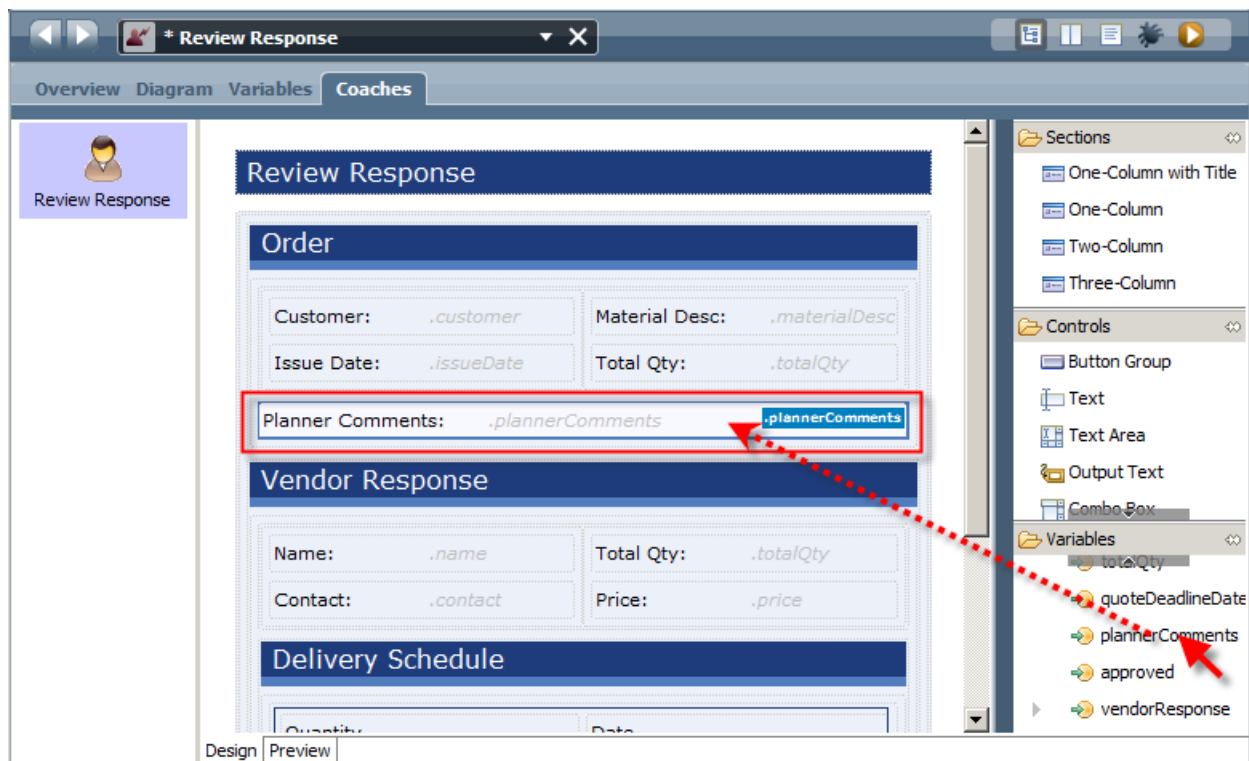


- ___e. Use the drop-down list at the top of the screen to switch to the *Review Response* user interface.
- ___f. Right-click between the *Start* and *End* events and select *Paste*.
- ___g. Change the name of the coach to *Review Response*.
- ___h. Use the *Sequence Flow* tool to connect the *Review Response* activity to the *Start* and *End* events. When you are finished, your screen should look similar to the following picture:

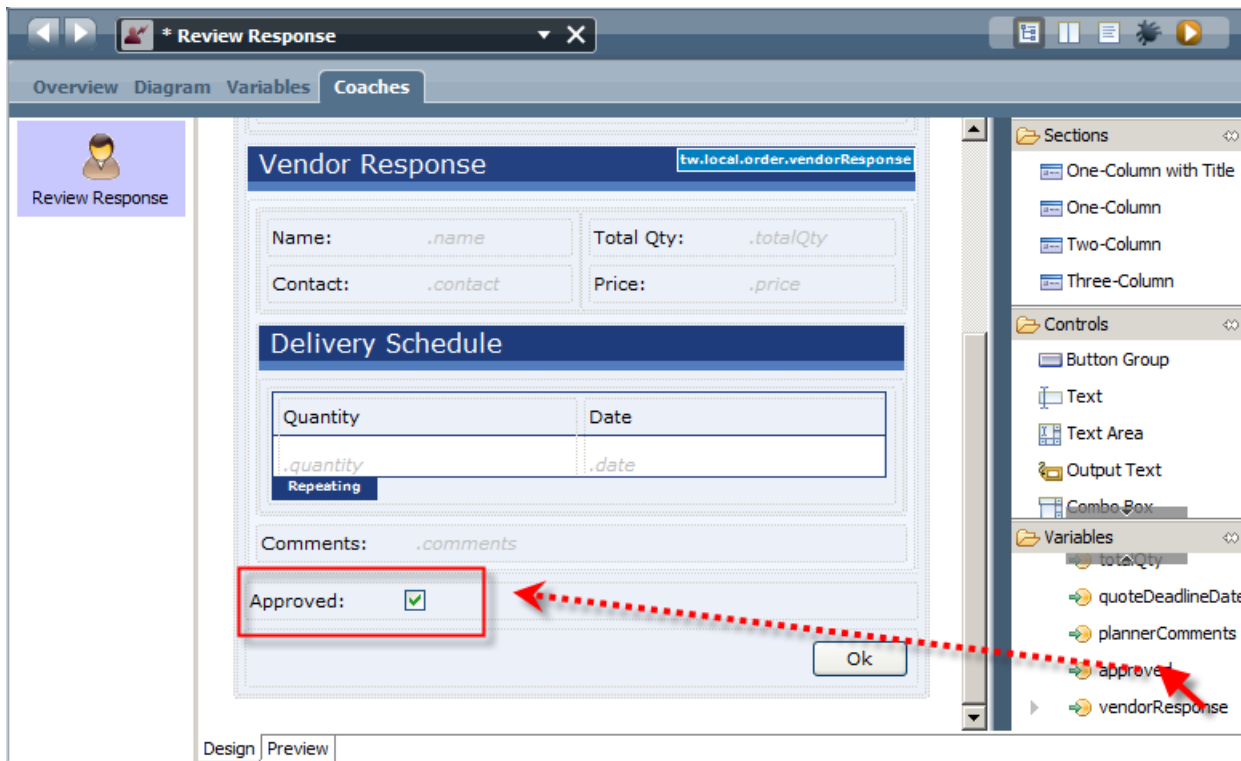


- ___4. Modify the *Review Response* coach.
- ___a. Double-click on the *Review Response* Coach.

- __b. Select the *Submit Response* title bar at the top of the coach and change the *Title* to *Review Response*.
- __c. Change all fields to *Output Text*. (Don't forget the fields in the table.)
- __d. Remove the *Add* and *Delete* controls from the table.
 - __i. Select the table. (Use the *Repeating* tag.)
 - __ii. Uncheck *Show Add Control* and *Show Delete Control*. (Properties pane, Presentation tab)
- __e. Add the *Planner Comments* to the coach.
 - __i. Expand the *order* variable.
 - __ii. Scroll down to the *plannerComments* variable.
 - __iii. Drag and drop the *plannerComments* variable to the bottom of the *Order* section. (Below the two-column area.)
 - __iv. Change the *Planner Comments* to *Output Text*.



- __f. Drag and drop the *approved* variable immediately above the *Ok* button.

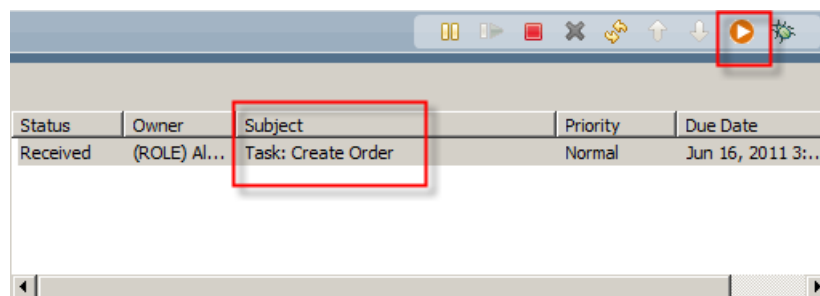


- __g. Save your work.
- __h. *Optional:* Playback your changes.

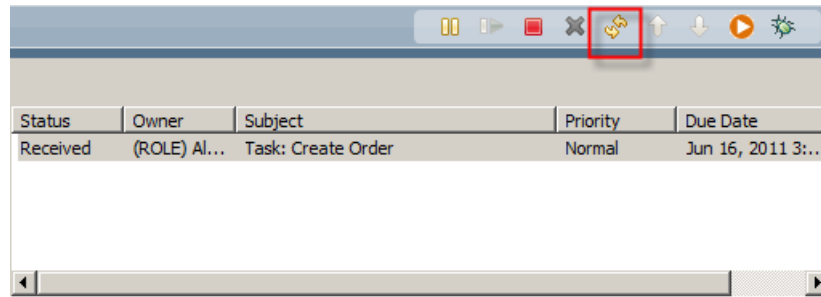
1.2.10 Playback the Process

The process is now complete. The next step is to run or playback the complete process.

- __1. Use the drop-down list at the top of the screen to switch to the *Order Fulfillment* business process definition.
- __2. Click the *Run* button.
- __3. In the Inspector view, select the *Create Order* task (top right pane), and click the *Run* button (above the selected task).



- __4. Run the activity as *tw_admin*.
- __5. Enter some test data into the screen and click the *Next >>* button.
- __6. Review the data, click *Submit*, and close the browser window.
- __7. In the Process Inspector, click the *Refresh* button.

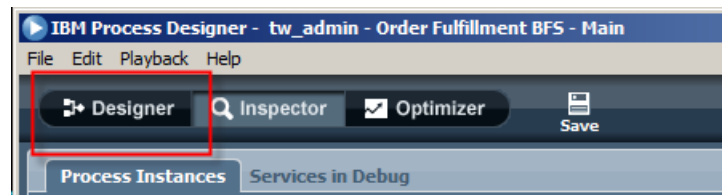


- __8. Select and run the *Submit Response* task as *tw_admin*.
- __9. Refresh the Process Inspector.
- __10. Select and run the *Review Response* task as *tw_admin*.
- __11. Review the information, check the approved box, click *Ok*, and close the browser window.
- __12. Refresh the Process Inspector. There should not be any running process instances or tasks.

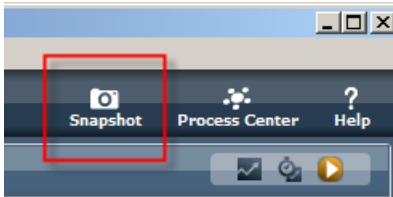
1.2.11 Create a Snapshot

The Process Center of the Business Process Manager provides the capability to take a snapshot of the current process application. A snapshot allows you to go back and see a previous version of the process application. Additionally, snapshots are used to deploy or install versions of the process application into other environments, such as QA or Production.

- __1. Click on the *Designer* button in the top left corner to return to the Process Designer.

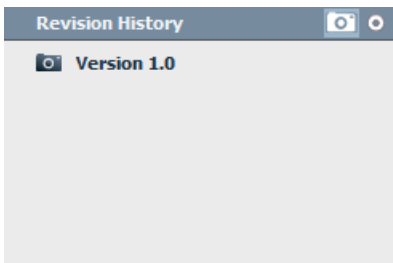


- __2. Click on the *Snapshot* icon in the top right corner of the screen.



- __3. Name your snapshot *Version 1.0* and click *OK*.

Notice that the new snapshot is displayed in the *Revision History*, located in the bottom left pane.



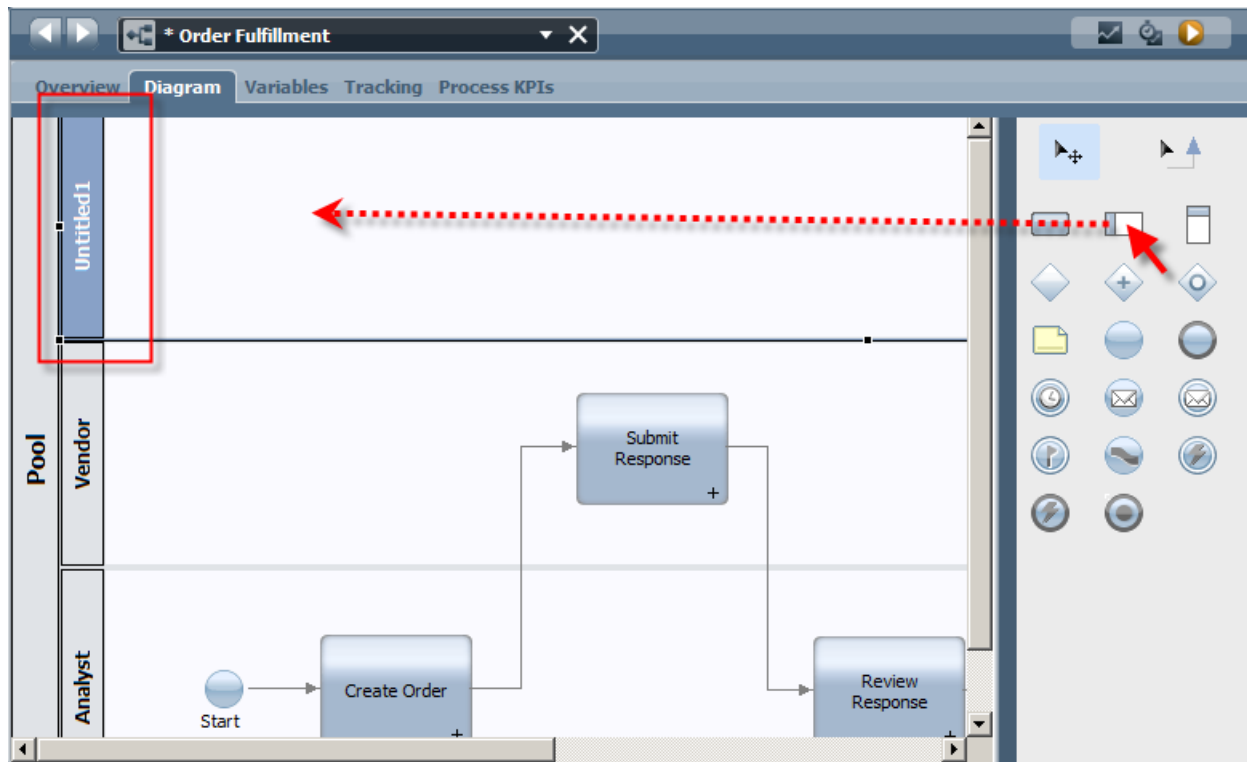
1.3 Part 2 – Modify the Process

As is always the case, shortly after you deploy your process, a new requirement comes in. In this case, you are asked to route all high priority order to a manager for approval.

1.3.1 Add *Manager* Lane and Activity

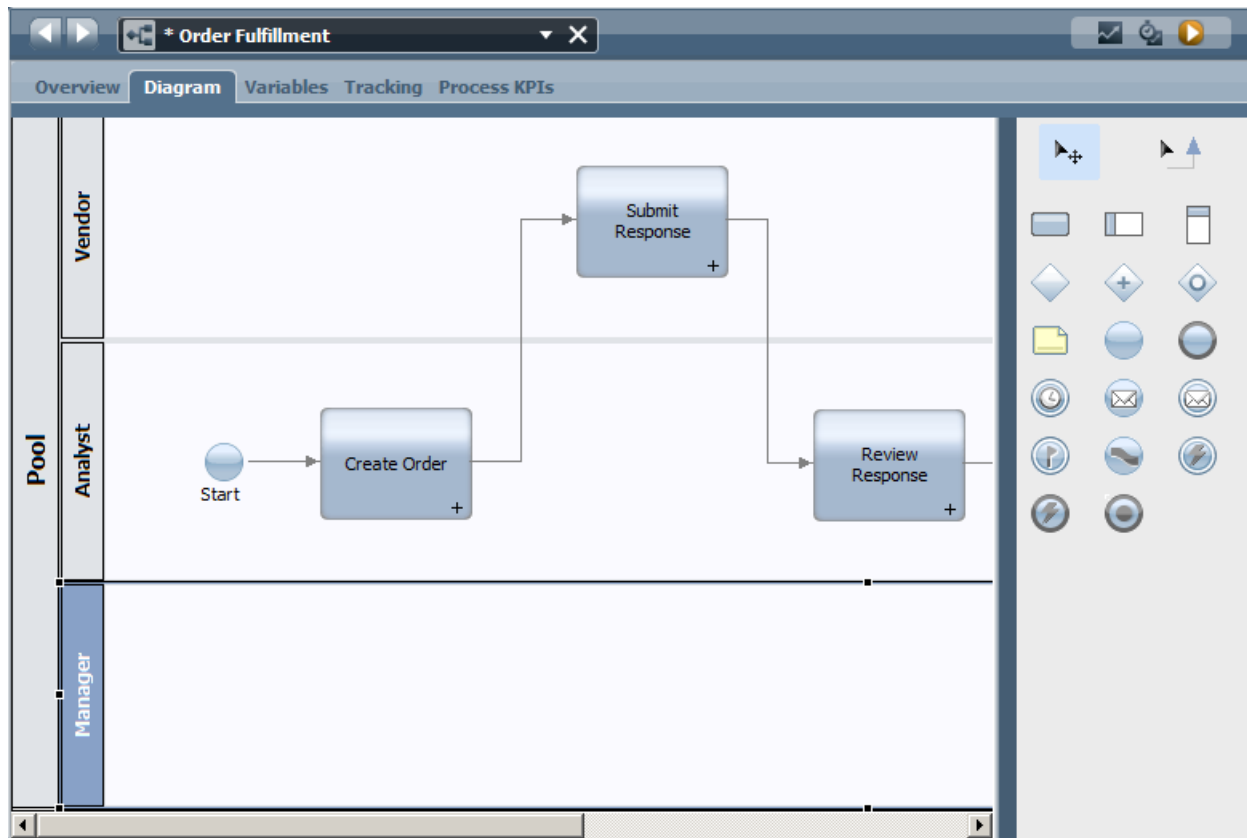
- __1. If you are not already in the *Order Fulfillment* business process designer, go there.

- __2. Add the *Manager* Lane to the diagram.
- __a. Drag and drop a new lane onto the diagram.

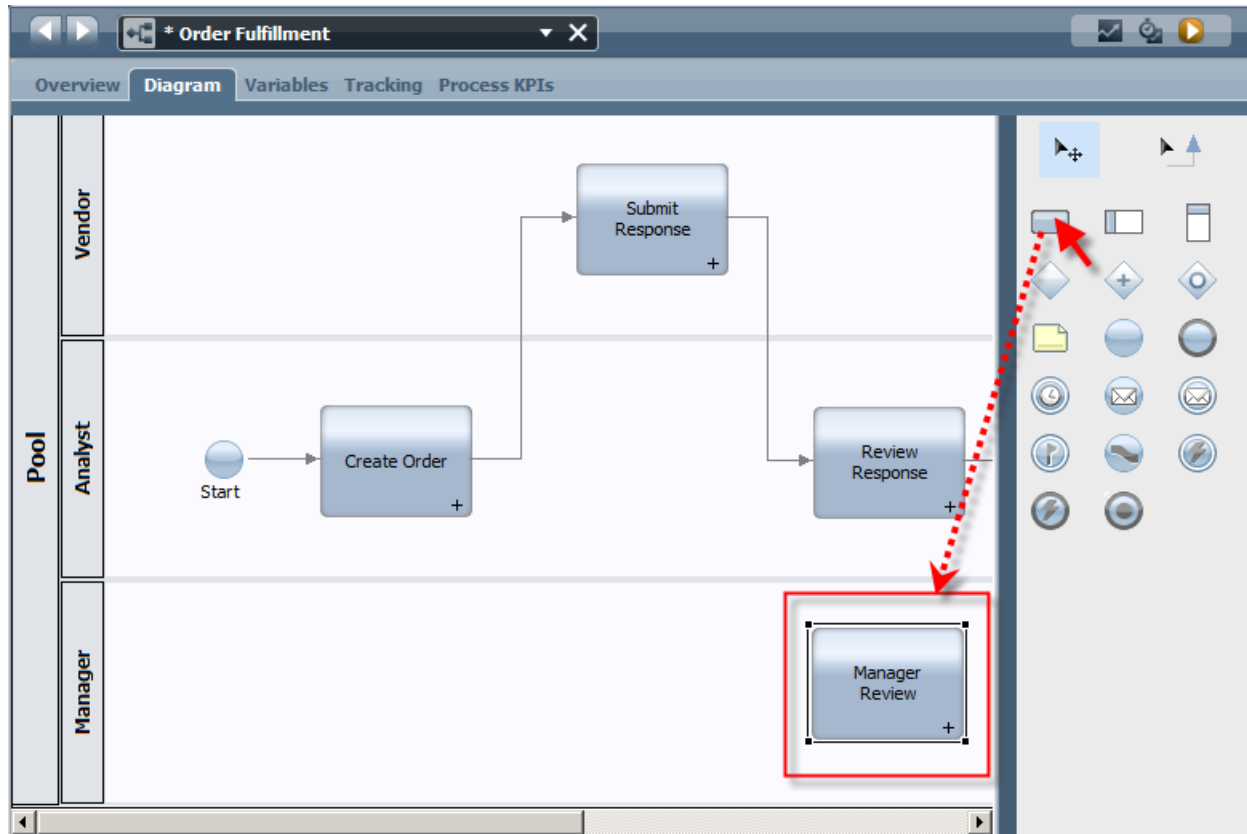


- __b. Change the *Name* of the lane to *Manager*.

- __c. Highlight the *Manager* lane and drag it to the bottom of the diagram. Your diagram should now look similar to the following picture:

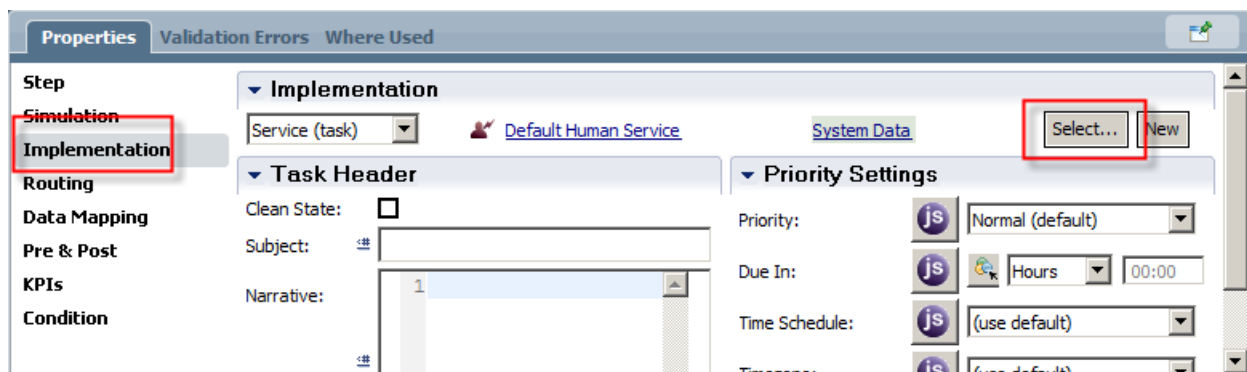


- __3. Add the *Manager Review* activity to the process diagram.
- __a. Drag and drop an activity in the *Manager* lane, below the *Review Response* activity.
 - __b. Change the *Name* of the activity to *Manager Review*.

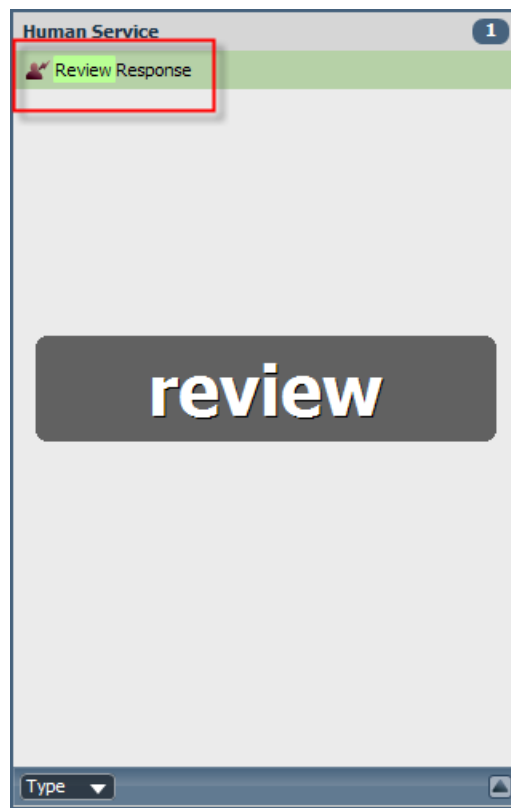


For the *Manager Review* activity, you will reuse the existing *Review Response* user interface.

- __c. In the Properties pane, click on the *Implementation* tab.
- __d. In the *Implementation* section, click on the *Select...* button.

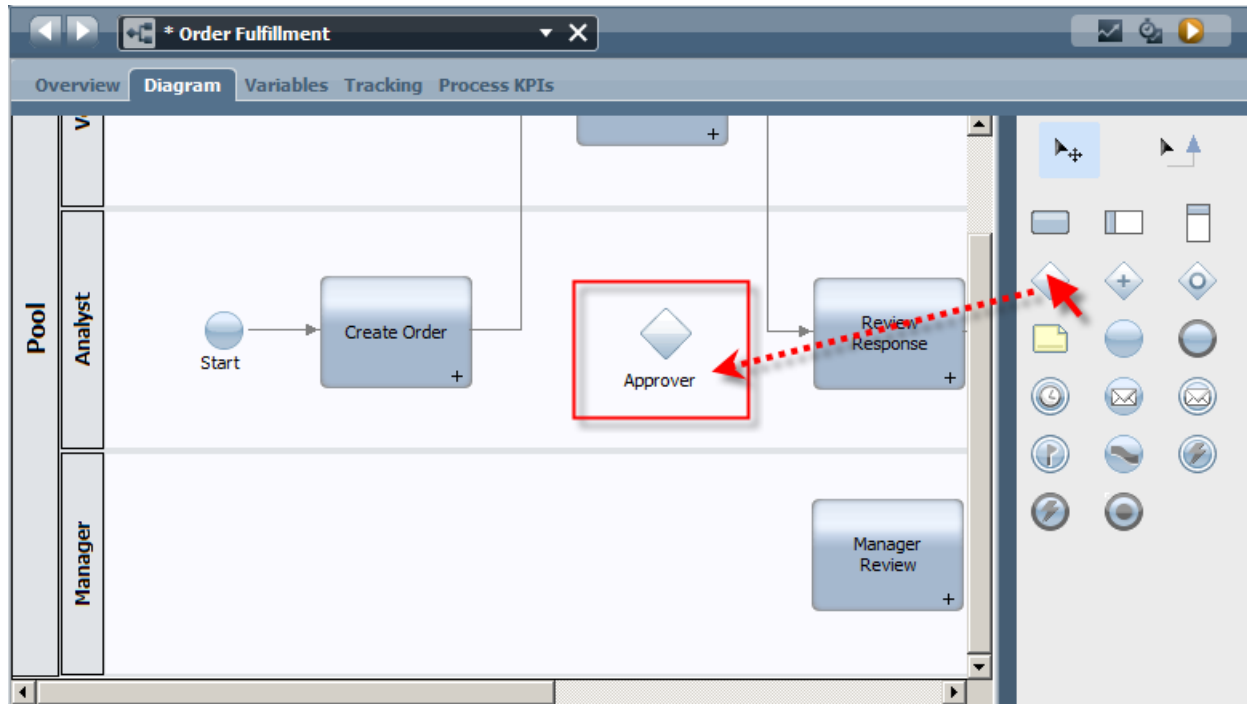


- ___e. Type *review*, and then select the *Review Response* user interface.



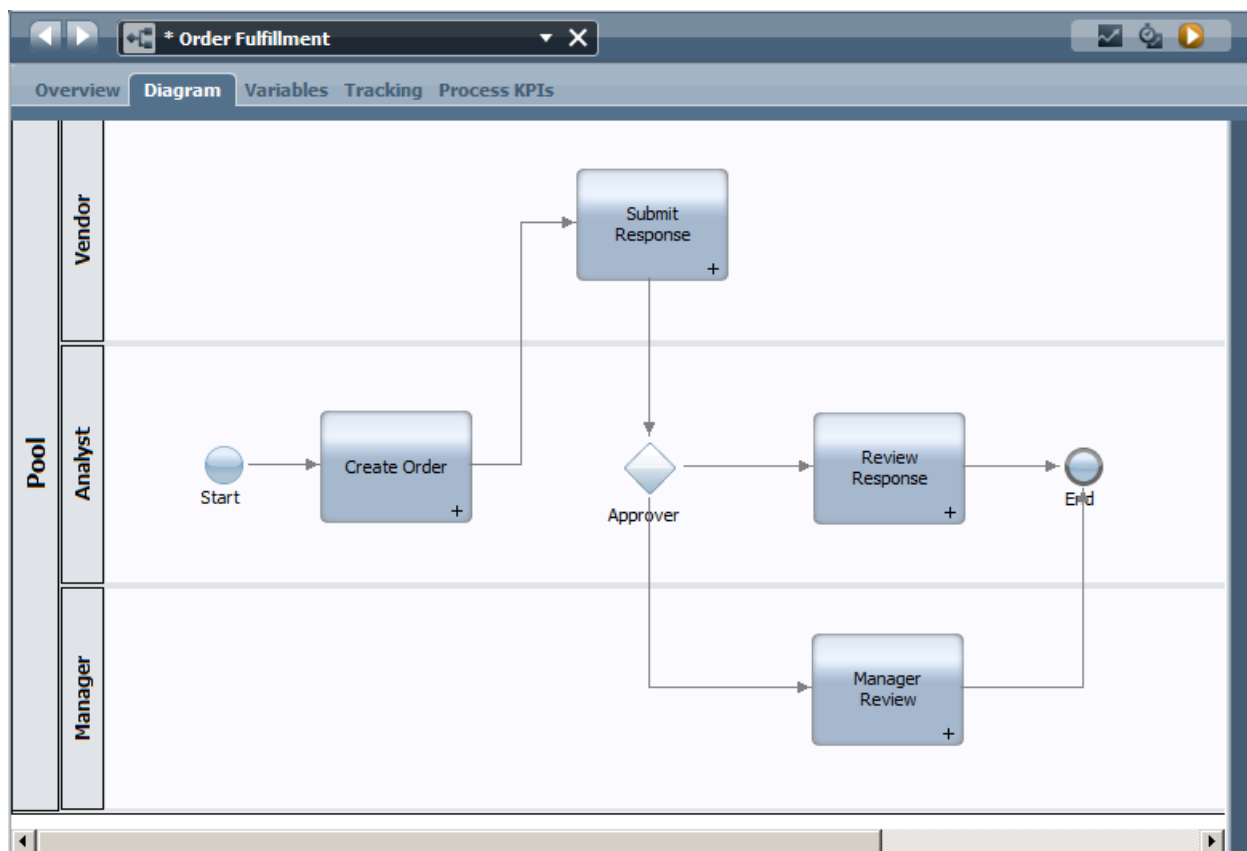
1.3.2 Add A Decision

- __1. Drag and drop a *Decision Gateway* to the left of the *Review Response* activity.
- __2. Change the *Name* of the decision to *Approver*.

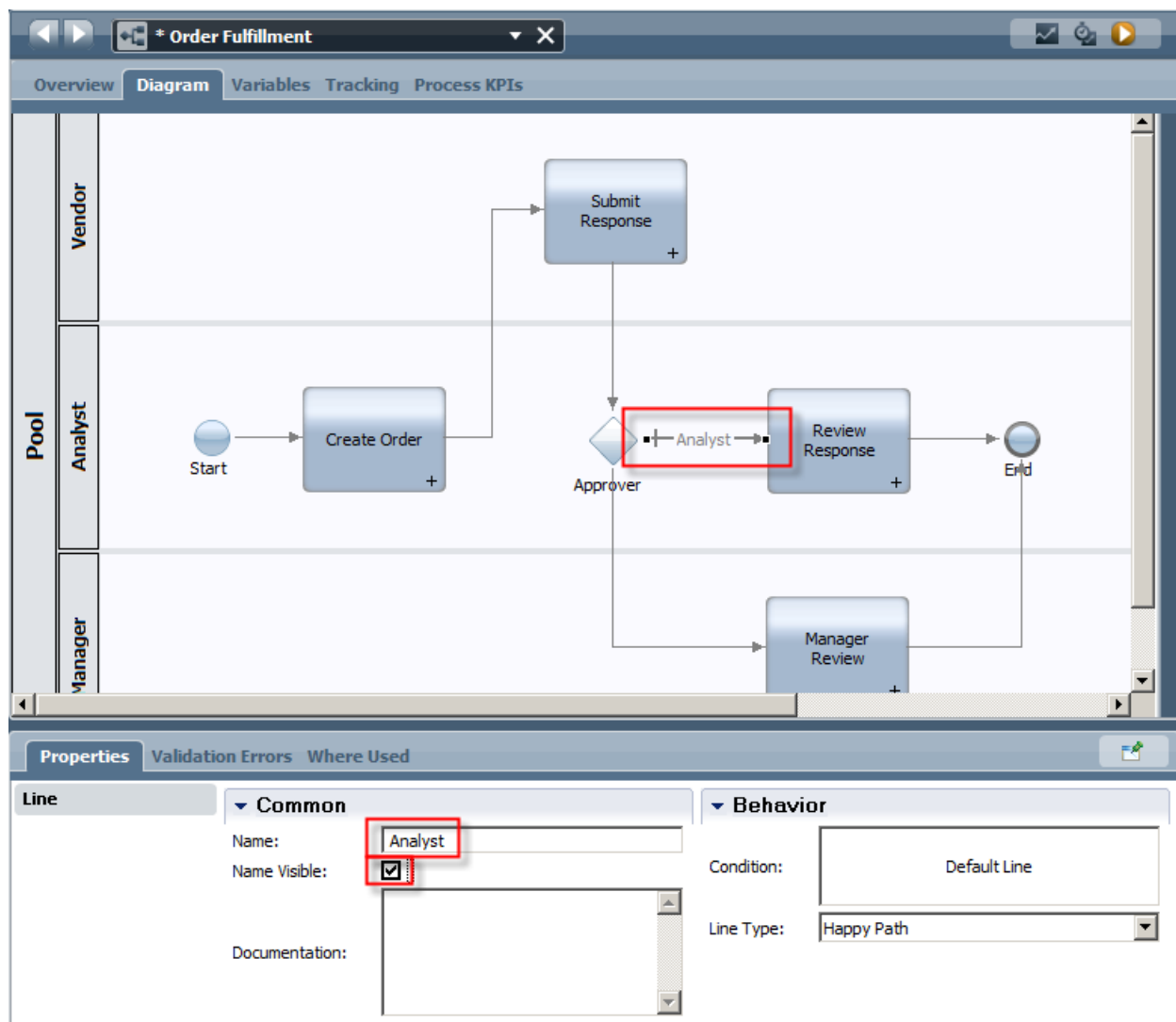


- __3. Wire in the decision.
- __a. Delete the connection from the *Submit Response* activity to the *Review Response* activity.
 - __b. Using the *Sequence Flow* tool, connect the *Submit Response* activity to the *Approver* decision.
 - __c. Connect the *Approver* decision to the *Review Response* activity.
 - __d. Connect the *Approver* decision to the *Manager Review* activity.
 - __e. Connect the *Manager Review* activity to the *End* event.

Your diagram should look similar to the following picture:

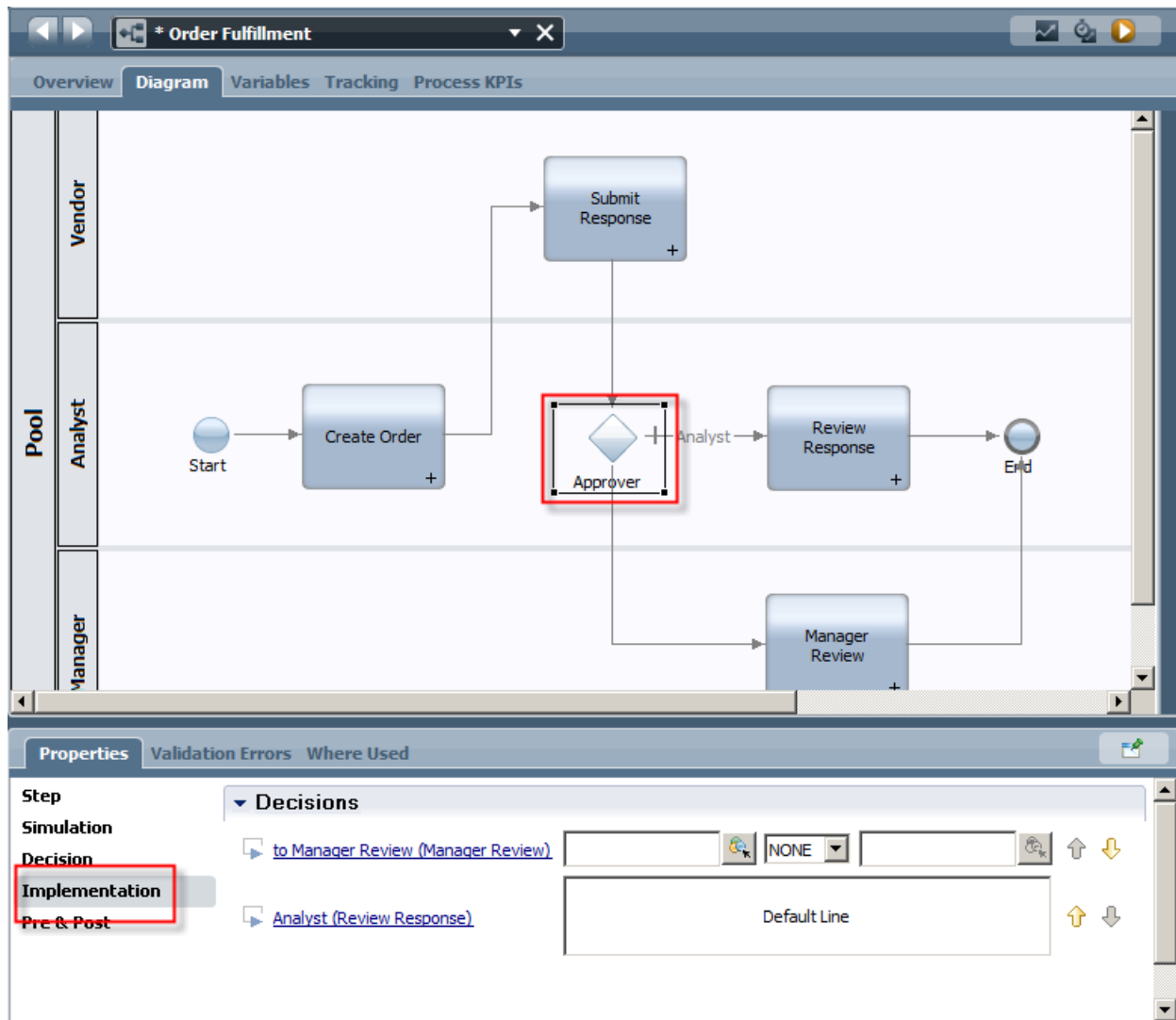


- __f. Add a label to the *Approver* connections.
- __i. Select the connection from the *Approver* decision to the *Review Response* activity.
- __ii. In the Properties pane, change the *Name* of the line to *Analyst*.
- __iii. Check the *Name Visible* box.

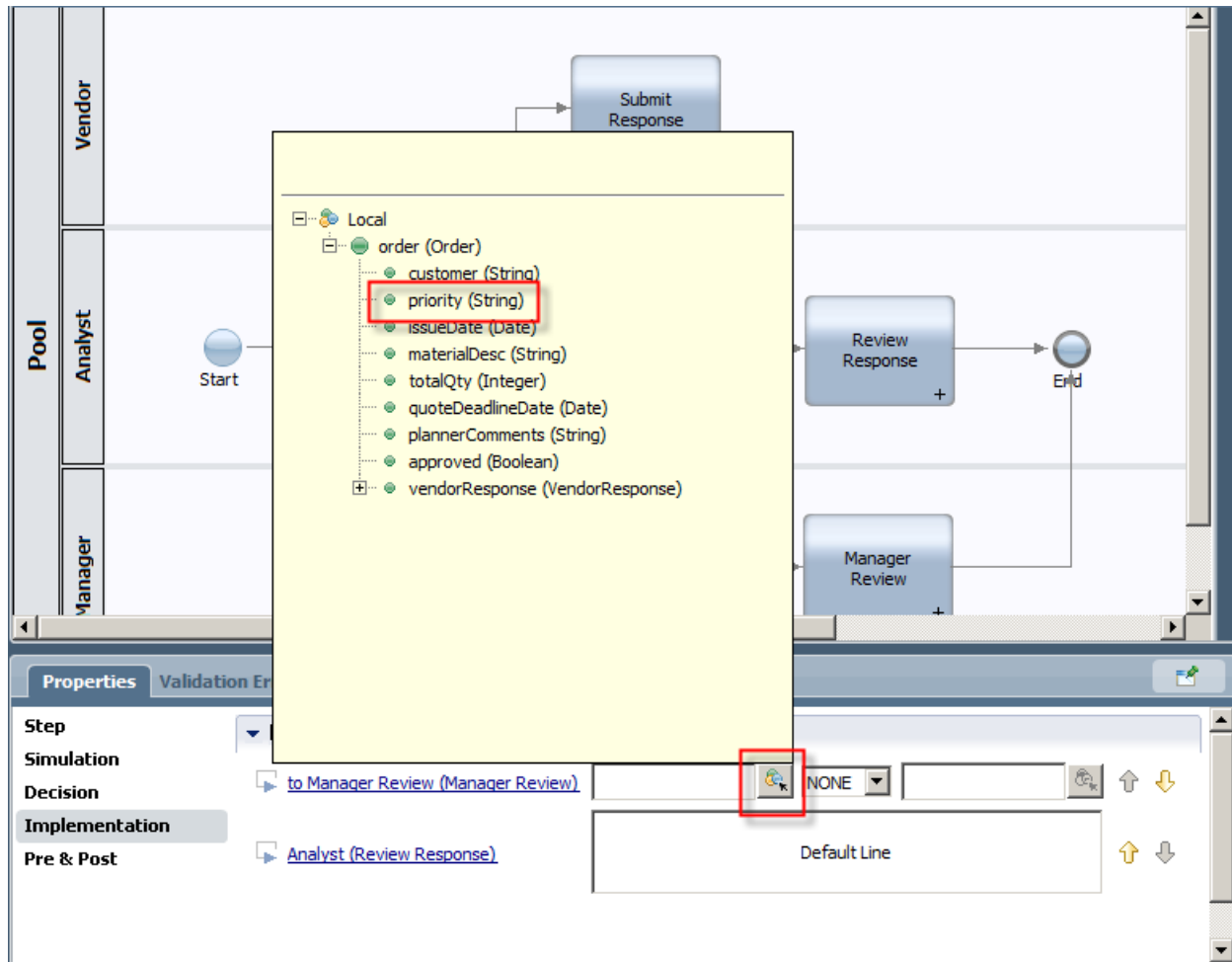


- __iv. Optional: Repeat the steps for the connection from the *Approver* decision to the *Manager Review* activity, naming the line *Manager*.

- __4. Add the logic to the *Approver* decision.
- __a. Select the *Approver* decision.
- __b. In the Properties pane, click on the *Implementation* tab.



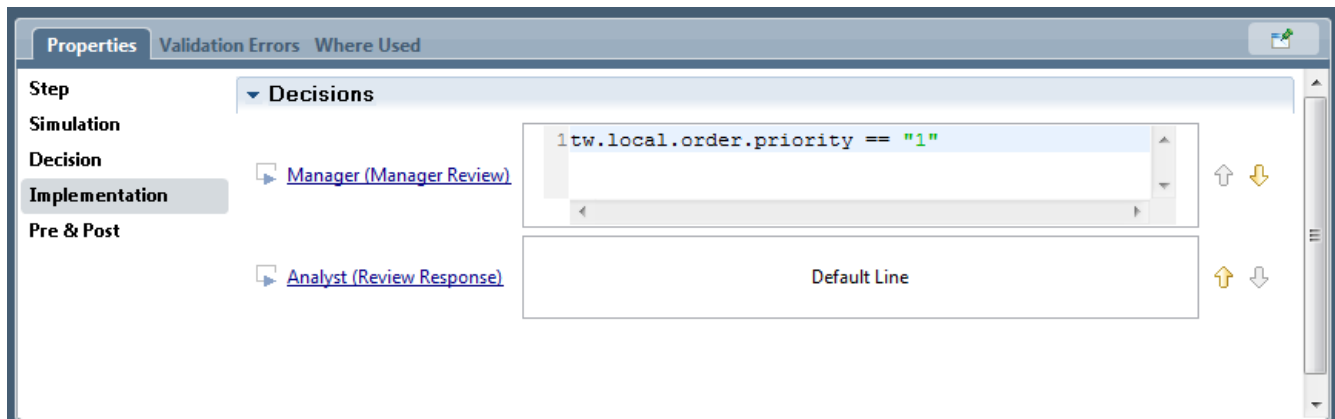
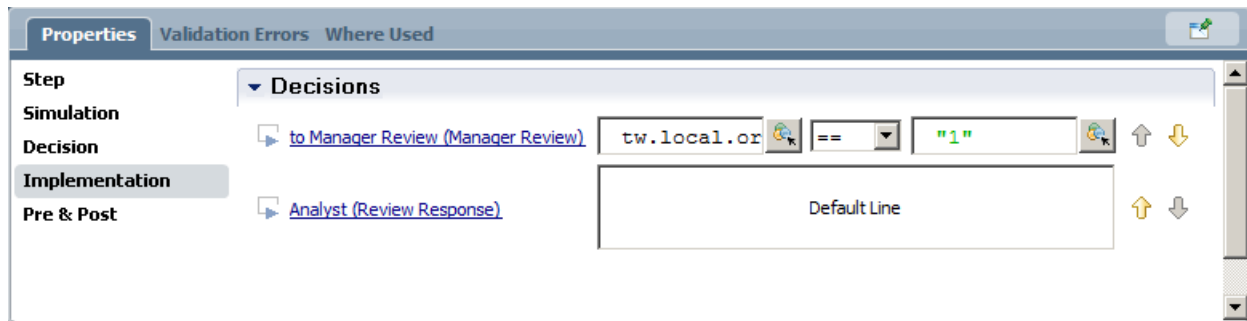
- __c. In the field to the right of *to Manager Review (Manager Review)*, click the object selection icon (.
- __d. Select *priority (String)*.



- __e. In the operator drop-down list, select ==.



__f. In the last field, type "1". (Including the quotation marks).



__5. Save your work.

You have completed the modifications to the process. It is now ready to be tested.

1.3.3 Playback the Process

Use the Process Inspector to test the process. If you need a refresher on using the Process Inspector to test the process, refer back to Section 1.2.10. When you test the process, make sure to one of the order's priority to *High* to make sure the decision is working properly. To run new instances of the process in the Process Inspector, click on the *Run* button above the process diagram.

1.3.4 Create a Snapshot

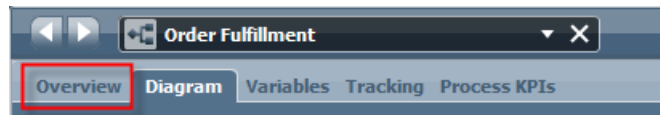
- __1. Click on the *Snapshot* icon.
- __2. Name the snapshot *Version 1.1*.

1.4 Part 3 – Run the Process in the Process Portal

So far, all of the instances have been run within the Process Inspector of the IBM Process Designer. In the next section, you will be running the process in the Process Portal, one of the user interface options that ships with the IBM Business Process Manager.

1.4.1 Update the Process Properties

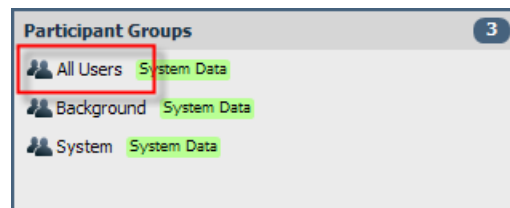
- __1. In the Process Designer, click on the *Overview* tab.



- __2. In the *Exposing* section, click on the *Select* button next to *Expose to start*.

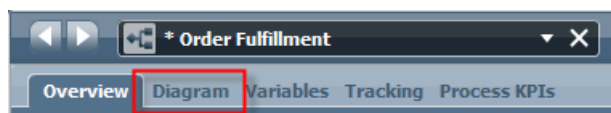


- __3. Select *All Users*.

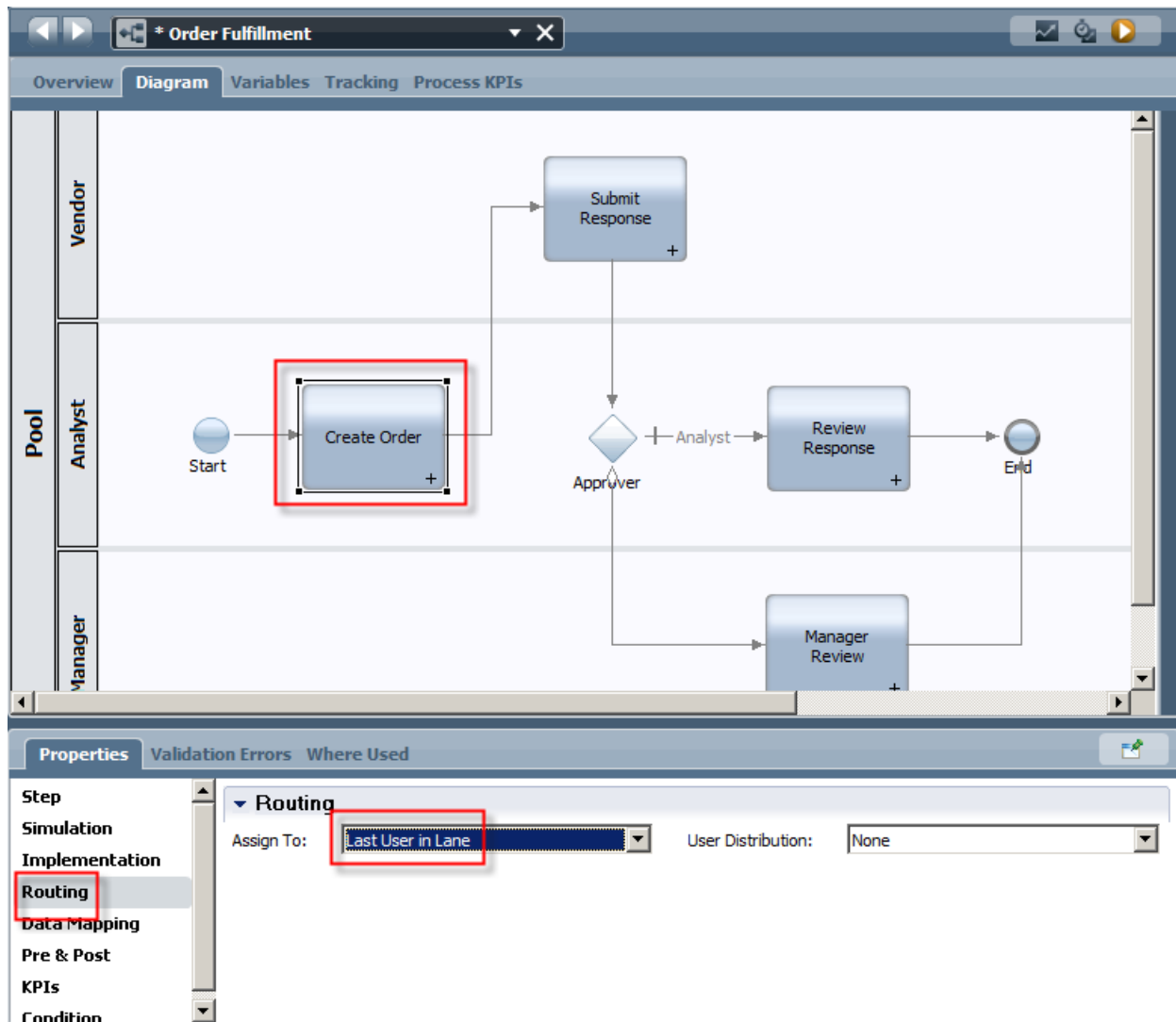


This specifies that all users will have the ability to start a new instance of the *Order Fulfillment* process.

- __4. Switch back to the diagram.



- __5. Click on the *Create Order* activity, and click on the *Routing* tab in the Properties pane.
- __6. In the *Assign To* drop-down list, select *Last User in Lane*.



This will cause the first activity to be launched as soon as the user creates a new instance of the *Order Fulfillment* process.

- __7. Save your changes.

1.4.2 Run the Process in the Process Portal

- __1. Launch the Firefox Web browser, using the icon on the bottom of screen.



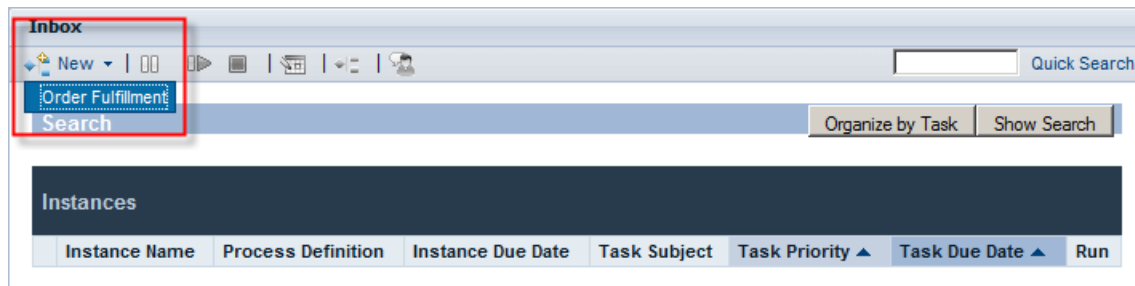
__2. Click on *Process Portal* in the Firefox toolbar.



__3. Login using *tw_admin* as the *User Name* and *Password*.

 A screenshot of the "Process Portal Login" form. It has a title bar "Process Portal Login". Below it, there are two input fields: "User Name" with the text "tw_admin" and "Password" with masked characters. A "Login" button is below the password field. At the bottom, it says "Licensed Materials - Property of IBM. © Copyright IBM Corporation 2000, 2011."

__4. In the Inbox, click on the *New* drop-down list and select *Order Fulfillment*.

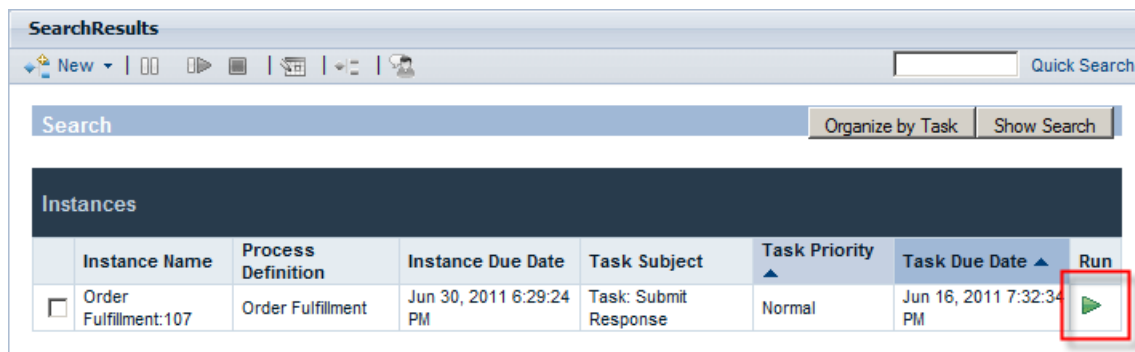


__5. Complete the *Create Order* activity.

__6. Refresh the browser window by clicking on the refresh icon (🔄) or by pressing F5.

The next activity in the process is displayed in the Inbox.

__7. Click on the *Run* button next to the *Submit Response* activity to claim and run the activity.



__8. Complete the *Submit Response* activity.

- __9. Refresh the browser.
- __10. Claim and complete *Review Response* activity.
- __11. Refresh the browser.

You have successfully completed running the *Order Fulfillment* process in the Process Portal.

1.5 Summary

In this lab you created a complete, albeit simple, order fulfillment process from scratch. The process included all of the user interfaces, or Coaches, necessary to complete the process. Using IBM BPM's shared model, you were able to quickly change and test all of the individual components, as well as run the entire process from start to finish.